

# officeGATE Manual – version 6.0



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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 4.8 https://dotnet.microsoft.com/download/dotnet-framework/net48
- 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 <u>https://www.microsoft.com/en-us/download/details.aspx?id=35585</u>
- 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**

officeGATE is accessible for the users in two ways and versions:

1. **On-Premise version** – get the add-in from the contentACCESS package. officeGATE can be downloaded for free from the respective page of contentACCESS Central Administration. Navigate to **System => Client applications => officeGATE** button on the ribbon and download a free version of officeGATE from the link. For more information read the <u>officeGATE</u> section in the contentACCESS manual.

**2**. **Subscription based version** – get the add in from the <u>TECH-ARROW store</u>. Just click on the button **Buy** and select the version you need, or try out the free trial for 30 days. After you sign



up/place an order, the **Checkout** page will appear, where you can see the order datails and get officeGATE by clicking on the button "**Get officeGATE**". From here, you will be taken to the **Download Center**, and you will be able to download the officeGATE setup. In addition, from the Checkout page, you can go to **your account** and check the subscriptions, order history, and other details.

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:

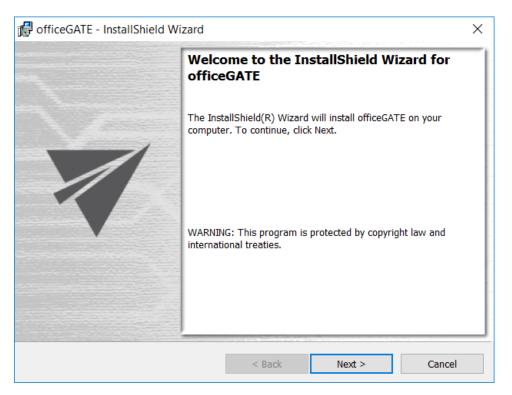


**Hint**: By The Group Policy installation only the English language is supported. For detailed information about GPO installation refer to chapter <u>Installation of officeGATE in a distributed company environment using Group</u> <u>Policy</u> of this guide.

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

your vision of technological evolution		
techarrow		
officeGATE - InstallShield Wizard		
officeGATE Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.		
Extracting: officeGATE_x64.msi		
Cancel		

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.



🕼 officeGATE - InstallShield Wizard			×
License Agreement Please read the following license agreeme	nt carefully.	7	officeGATE
Software License Ag PLEASE READ THIS SOFTW CAREFULLY BEFORE DOWN SOFTWARE. BY CLICKING ON THE "ACC PACKAGE, DOWNLOADING EQUIPMENT THAT CONTAIN CONSENTING TO BE BOUND	ARE LICEN NLOADING EPT" BUTTO THE PROD IS THIS PRO D BY THIS A	SE AGREEN OR USING T DN, OPENING UCT, OR US DDUCT, YOU	HE G THE ING THE J ARE
I do not accept the terms in the license agr			
InstallShield	< Back	Next >	Cancel

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

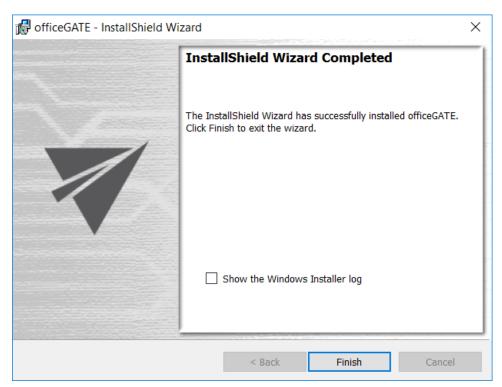
🖟 officeGA	TE - InstallShield Wizard			×
<b>Destinatio</b> Click Nex	o <b>n Folder</b> «t, or click Change to install to a di	fferent folder.	7	officeGATE
	Install officeGATE to: C:\Program Files\TECH-ARROW	\officeGATE\		Change
InstallShield -	[	< Back	Next >	Cancel

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

🕼 officeGATE - InstallShield Wizard			×
Ready to Install the Program		7	officeGATE
The wizard is ready to begin installation.			Uniceditie
Click Install to begin the installation.			
If you want to review or change any of yo the wizard.	our installation setti	ngs, click Back. Click	Cancel to exit
InstallShield			
	< Back	Install	Cancel

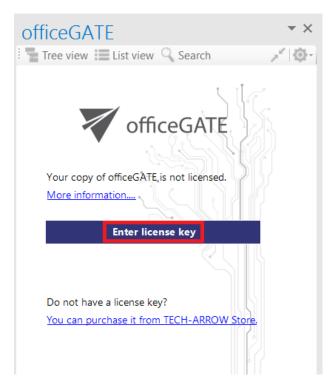




The last window of the installation process will offer for the user to open the Windows Installer log. Wish you check it, mark the "Show the Windows Installer log" checkbox. In case that you would not like to open it leave this checkbox empty.

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

If you downloaded and installed the officeGATE setup from the central Administration, then the following two sections will help finish the process. If you bought the officeGATE from the store and installed it from the Download Center, enter and activate the license key, and you all set.



# 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.

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SelectedLanguage	One of these values: en, de, no, zh-Hans, pt, sk, ar, cs, pl, hu, el	Two-letter code of the user 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	Specifies the number of off Integer synchronization thre (recommended 2, maximum is a		
OfflineSyncThreadPriority	One of these values: Lowest, BelowNormal, Normal, AboveNormal, Highest	Specifies the priority of the offline synchronization threads. Recommended value is "Lowest".	
OfflineAutoSyncEnabled	True/false	Specifies whether the automatic offline synchronization is enabled.	
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 artific states during the synchronization, in millise Set this value if the synchronization causes high 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	Description
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&gt; 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.





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

License key:		
Default login provider:	None	
Default language:	Not specified	
	Generate configuration	

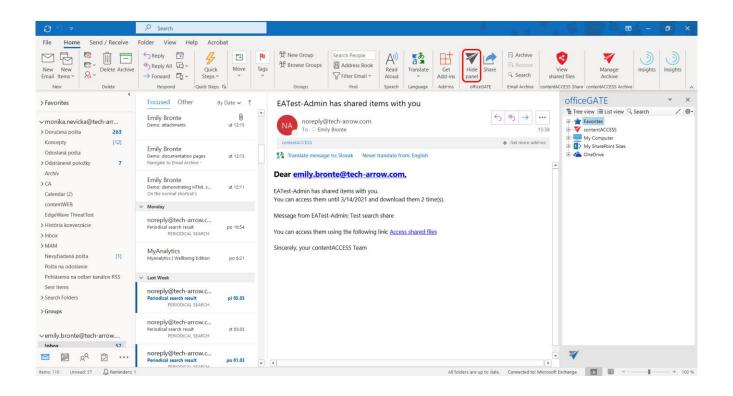
2) Further distribute the XML files with the Group Policy based on the "How to copy officeGate\_Configuration.xml using Group Policy" chapter of <u>this</u> guide.

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** (**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 (♥) in any message.



	2 ↑ ↓ ▼	Untitled - Message (HTML)		□ ×
File Me Paste 3 Clipboard 5	Basic Text ~		Insights         Image: Constraint of the second secon	^
) Send	From V To Cc Subject	emily.bronte@tech-arrow.com	OfficeGATE Tree view :≡ List view ♀ Search → Favorites → ✓ contentACCESS → ↓ Wy SharePoint Sites ⊕ ← ▲ OneDrive	✓ ×
	Juget			
4		v 	7	

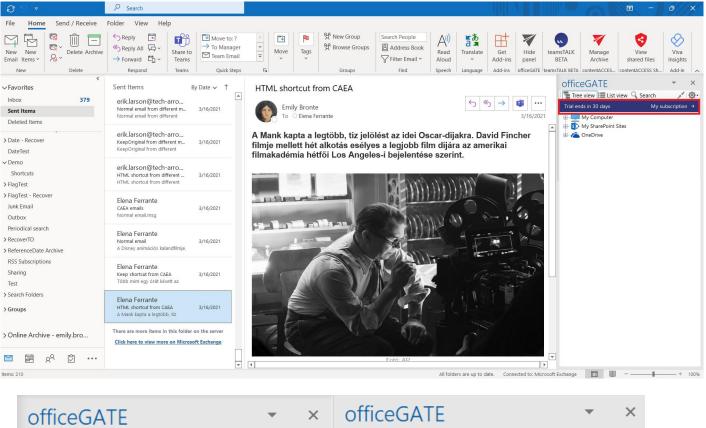
If officeGATE is downloaded and isntalled from the store, then a **notification bar** is displayed in the pane. The user can follow here when the trial/subcription ends and check their subscriptions (account, orders, downloads, account details) in the TECH-ARROW store by clicking on the **My subcription** or the arrow.

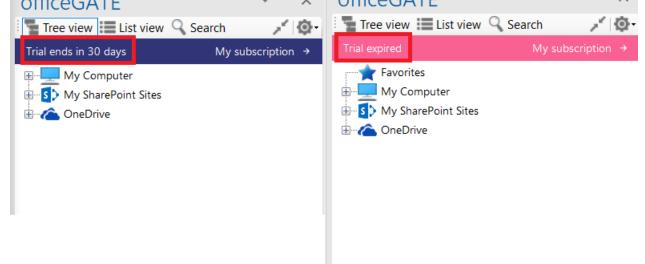
This notification bar is visible during the whole trial period, but after the user buys the required version, this bar will only appear five days before the subcription expires. When the trial/subcription ends, the user is still able to use the same license key for 7 days before the license expires. The license key and the subcription can be renewed from the <u>store</u>.

During the trial period, the color of the notification bar is blue. Later, during those 7 days, the color will change from blue to pink, and the notification will say: "**Trial expired**".

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*Note:* In case you have troubles with displaying officeGATE check <u>Troubleshooting</u> section in this manual.

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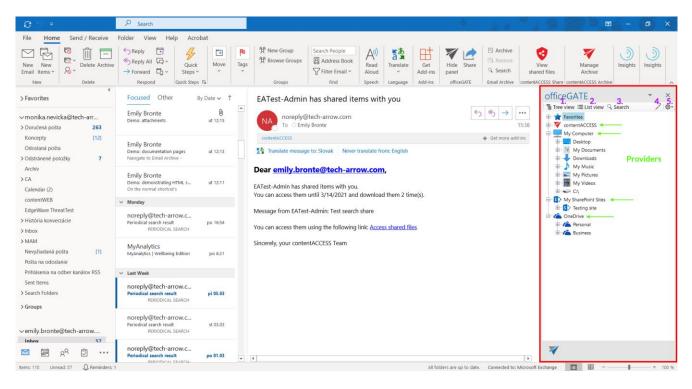


## officeGATE pane's overview

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 <u>here</u>;
- Search (3) more details <u>here;</u>
- 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.

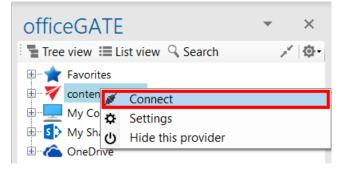




# **Connection settings**

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:

- Enable (enable = turn on) the desired provider(s) in the officeGATE settings (more information <u>here</u>);
- 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 <sup>(D)</sup> button and choose **Settings...** as shown on screenshot below. In the **officeGATE Settings** dialog switch to the <sup>(D)</sup> **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>.

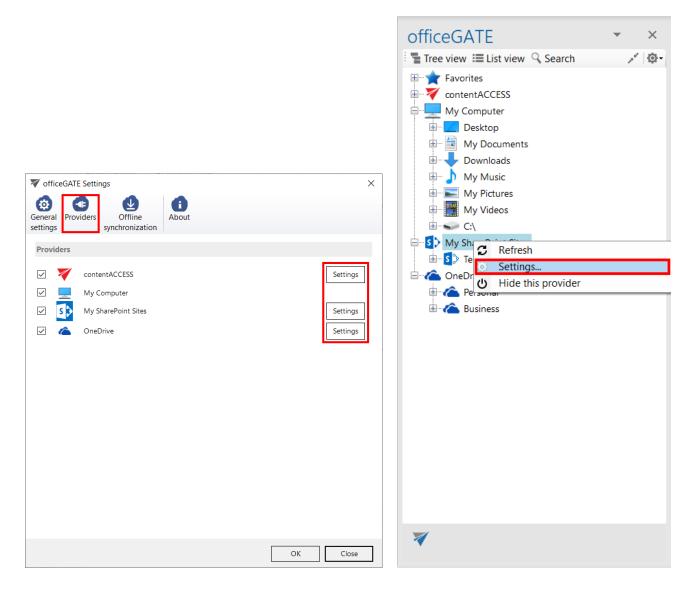
0 %	𝒫 Search	
File Home Send / Receive	Folder View Help Acrobat	
New New New Delete	Reply All C Y To Manager	
> Favorites	All Unread By Date v sett	synchronization lop - contentAcc OfficeGATE 1. ×
→ monika.nevicka@tech-arr  > Doručená pošta 278 Koncepty [26] Odoslaná pošta > Odstráneň položky 7	Katalon Team     Pi       [Video] Solving the Top 5 M     pi 12.03       Watch our Webinar For Top     If       noreply@tech-arrow.c     [Biild succeeded] contentXc       [Biild succeeded]     pi 12.03	widers  volders  contentACCESS  for the view ill List view Q Search  volters  contentACCESS  My Computer  My Computer  for Get more add-ins  for Get more add-ins  for Q Search  volters  for Get more add-ins  for Q Search  volters  for Q Search  volter
Archiv > CA Calendar (2) contentWEB	noreply@tech-arrow.c [Build succeeded] Shareapp pi 12.03 [Build succeeded] Shareapp-CI -	ConeDrive Settings zure DevOps Server
EdgeWave ThreatTest > História konverzácie > Inbox	noreply@tech-arrow.c [Build succeeded] contentAC pi 12.03 [Build succeeded]	
> MAM Nevyžiadaná pošta [1]	noreply@tech-arrow.c [Build succeeded] contentAC pi 12.03 [Build succeeded]	
Pošta na odoslanie Prihlásenia na odber kanálov RSS Sent Items	IP2Location [IP2Location Tips & Resourc pi 12.03 This is the key. How geolocation	
> Search Folders > Groups	noreply@tech-arrow.c [Build succeeded] contentAC pi 12.03 [Build succeeded]	OK
√emily.bronte@tech-arrow	noreply@tech-arrow.c [Build succeeded] officeGATE \$t 11.03 [Build succeeded] officeGATE -	Build pipeline contentACCESS-CI Finished Mon. Mar 15 2021 11:13:52 GMT+01:00
Μ         β         β         ···           Items: 7 421         Unread; 278         Δ Reminders: 1		Finished         Mich, Mar 15 202111:15:52 GM1+01:00         Image: Comparison of the comparison

Note: You can hide the providers using the provider's context menu as well. Right click on the provider in the pane and select **U** Hide this provider from the context menu items. officeGATE × 📲 Tree view 📰 List view 🔍 Search × 🔯-Havorites Open contentWEB -My C ÷.... Refresh  $\mathcal{C}$ 🗄 📑 My S Settings... 🗄 🗥 🏠 One[ Hide this provider Enable offline access (recursive)



## Connecting to providers

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 (1<sup>st</sup> screenshot below) or b) from the given provider's context menu (2<sup>nd</sup> 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 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>)
  - Choose if you want to have **Email archive buttons** shown on the toolbar.
  - Save your settings.



ContentAC	CESS connector settings	- 🗆 ×
	Connection	
1	Server name:	https://caea.tech-arrow.com/
•		Generate connection URL
	Connection URL:	https://caea.tech-arrow.com/contentACCESSWS/ModelService.svc
	Sharing	
	Show sharing buttor	n on the toolbar
	Use default settings	and don't ask before new sharing
	Expiration days:	1
	Download count limit:	1 0 = no limit
	General	
	Maximum number of lo	okup items:
		20
	Email archive	
	Show email archive	buttons on the toolbar
	User login status	
	You are not logged in.	
		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 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>)
- Choose if you want to have **Email archive buttons** shown on the toolbar.
- Save your settings.

ContentAC	CESS connector settings	- 🗆 X			
	Connection				
	Server name:	https://caea.tech-arrow.com/			
		Generate connection URL			
	Connection URL:	http://caea.tech-arrow.com/contentACCESSWS/ModelService.svc			
	Sharing				
	Show sharing buttor	n on the toolbar			
	Use default settings and don't ask before new sharing				
	Expiration days:	1			
	Download count limit:	1 0 = no limit			
	General				
	Maximum number of lo	·			
		20			
	Email archive				
	Show email archive	buttons on the toolbar			
	User login status				
	You are not logged in.				
		Login Logout			
		Save Cancel			

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# 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: <u>http://[ServerName]:8736/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 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>)
- Choose if you want to have **Email archive buttons** shown on the toolbar.
- Save your settings.



ContentAC	CESS connector settings	- 🗆 X		
	Connection			
	Server name:	https://caea.tech-arrow.com/		
•		Generate connection URL		
	Connection URL:	https://caea.tech-arrow.com: <mark>8736</mark> /contentACCESSWS/ModelService.svc		
	Sharing			
	Show sharing buttor	n on the toolbar		
	Use default settings and don't ask before new sharing			
	Expiration days:	1		
	Download count limit:	1 0 = no limit		
	General			
	Maximum number of lookup items:			
		20		
	Email archive			
	Show email archive	buttons on the toolbar		
	User login status			
	You are not logged in.			
		Login Logout		
		Save Cancel		

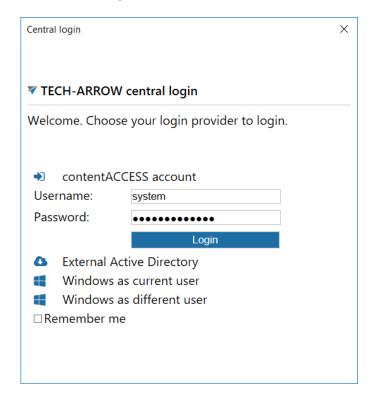
There are two possible ways to log in to contentACCESS:

 After filling in your settings and before saving, 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 o	entral login	
Welcome. Choose	your login provider to login.	
Last time used:		
<ul> <li>contentACC</li> </ul>	ESS account	
Username:		
Password:		
	Login	
□Remember me		
<u>Use another logir</u>	n method	

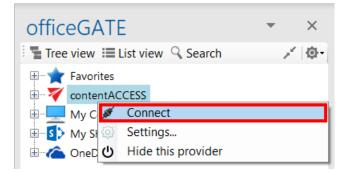
Select the Login provider that you would like to use, enter your credentials and click on the blue Login button. Then, **Save** your settings.



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2. After saving your settings, 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:				
contentACCESS account				
Username:				
Password:				
	Login			
□Remember me				
Use another login 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. Choos	se your login provider to login.	
<ul> <li>contentAC</li> </ul>	CESS account	
Username:	system	
Password:	••••	
	Login	
📤 External A	ctive Directory	
📢 Windows	as current user	
📢 Windows	as different user	
□Remember m	e	

*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	
The <b>Windows</b> authentic be selected.	ation type for the old login works only with "current user", an	other user car	not



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

officeGATE	<b>-</b> ×
📱 Tree view 🗮 List view 🔍 Search	× @-
Favorites	
contentACCESS	
Email archive (EA_Test)	
File system archive (EA_Test)	
🗄 📲 GDPR Application (EA_Test)	
🗄 🖳 GDPR Exchange (EA_Test)	
🗄 🖷 🕞 GDPR File system (EA_Test)	
🗄 🔚 🖬 SharePoint archive (EA_Test)	
🗄 🗁 Sharing (EA_Test)	
🗄 🖃 📑 Teams archive (EA_Test)	
🗄 🔚 📊 Teams chat archive (EA_Test)	J
🗄 🖳 My Computer	
Hard My SharePoint Sites	
OneDrive	

*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</u> <u>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.



ContentAC	CESS connector settings			_		×
	Connection					
1	Server name:	https://caea.tech-arrow.com/				]
•		Generate connection URL				
	Connection URL:	https://caea.tech-arrow.com/c	contentACCESSWS/M	odelServio	ce.svc	
	Sharing					
	Show sharing buttor	n on the toolbar				
	Use default settings	and don't ask before new shari	ing			
	Expiration days:	1				
	Download count limit:	1 0	= no limit			
	General					
	Maximum number of lo	okup items:				
		20				
	Email archive					
	Show email archive I	outtons on the toolbar				
	User login status					
	You are logged in as	ATest-Admin.				
			Login		Logout	
			Sa	ive	Cance	5l

#### 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

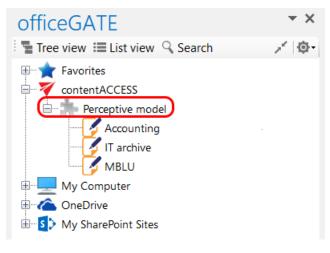


user login will be created automatically in the background when logging into the Datengut/Perceptive DMS from officeGATE.

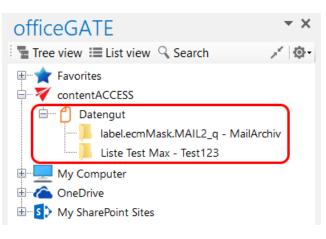
How to connect to the Datengut/Perceptive DMS in officeGATE: First, you need to configure and log in to the contentACCESS provider (read more in <u>this</u> section). When logging in:

- 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



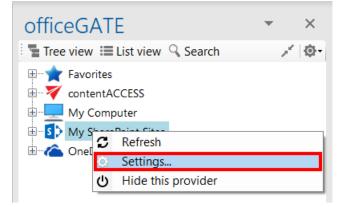
#### Connecting to SharePoint site(s)

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).



In the **SharePoint connector settings** window, you will be able to specify one **Global user**. This user can be used for connecting to multiple sites without having to enter the credentials over and over again. Simply check a checkbox (will be shown later in this section). If the global user credentials get changed, they will be changed for all sites that you are logging on to with the global user option.



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 c	connector settings					_		×
Global user								
0	Specify user which w	vill be used to access	one or more sites.					
$\sim$	User name:	monika.nevicka@te	ch-arrow.com					
	Password:	*****						
	Confirm password:	*****						
Sites								
	Url		Login	Enabled				
5 2	https://techarrow.sh							
			admin@eimdemo1.onmicrosoft.com	$\checkmark$				
	https://techarrow.sh	harepoint.com/site	global: monika.nevicka@tech-arrow.c	$\checkmark$				
	Add new site	2	Edit site Delete site					
Content types								
	✓ Show the content	t type selection dialo	og only if required fields are present					
					Save	2	Cance	èl

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. Check the **Enabled** checkbox if you want the site to be enabled. Specify the user you want to log in with – you can use the previously specified global user, enter credentials of a different user and set him also as global user, or you can choose the integrated authentication. If the **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.



If the **Microsoft online authentication** checkbox is checked, you will be authenticated using the **Modern authentication**, which is a very complex and secure way. The **Login** and **Password** textboxes will be also disabled. You can read more about modern authentication in <u>this</u> article.

Further check the connection with clicking the **Test connection** button and then click **Save**.

SharePoir	nt connector se	ettings	_		Х
Settings					
	Site:				
5 🔊		✓ Enabled			
	Logon with	◯ Global user: monika.nevicka@tech-arrow.com			
		O This user:			
		Password:			
		Set as global user			
		O Integrated authentication			
		Microsoft online authentication			
Test	t connection	Sa	ive	Cance	ł

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).

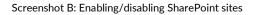
Specify user which will be used to access one or more sites.   User name:   monika.nevicka@tech-arrow.com   Password:   Confirm password:     Sites     1. Select the site.   Und   Intps://techarrow.sharepoint.com/site   global monika.nevicka@tech-arrow.com     Sites     1. Select the site.   Und   Intps://techarrow.sharepoint.com/site   global monika.nevicka@tech-arrow.com     Sites   Intps://techarrow.sharepoint.com/site   global monika.nevicka@tech-arrow.com     Sites   Intps://techarrow.sharepoint.com/site   global monika.nevicka@tech-arrow.com     Intps://techarrow.sharepoint.com/site   global monika.nevicka@tech-arrow.com   Add new site   Exit site   Delete site   2. Click to edit the connection.   Show the content type selection dialog only if required fields are present     Tot parametric     State siglobal user     Online authentication     3. Edit the connection settings.	SharePoint of Global user	connector settings						×		
Password:   Confirm password:     Sites     1. Select the site.     Unit https://techarrow.sharepoint.com/site monika.nevicka@tech-arrow.com     Sites     Unit https://techarrow.sharepoint.com/site admin@eimdemo1.onmicrosoft.com     Sites     Unit https://techarrow.sharepoint.com/site admin@eimdemo1.onmicrosoft.com     Sites     Add new site     Edit site        Content types        Content types                    Integrated authentication <th>8</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	8									
Sites  I. Select the site.  Und  Intps://techarrow.sharepoint.com/site global: monika.nevicka@tech-arrow.com  Add new site  Edit site Delete site  Content types  Content types  Settings  Settin		Password:			SharePoir	nt connector s	ettings			- 🗆 X
Uninterpoint.com/sitemonika.nevicka@tech-arrow.com       Site:       Intps://techarrow.sharepoint.com/siteglobal:         Add new site       Edit site       Delete site         Add new site       Edit site       Delete site         Content types       2. Click to edit the connection.         Show the content type selection dialog only if required fields are present	Sites				Settings					
Add new site       Edit site       Delete site         Content types       2. Click to edit the connection.         Show the content type selection dialog only if required fields are present       Microsoft online authentication	S	Url https://techarrow.s https://eimdemo1.s	Login harepoint.com/site_ monika.nevicka@tech-arrow.com harepoint.com/sit admin@eimdemo1.onmicrosoft.com	y V	S>		Global user:			
iest connection Save Cancel	Content types	;	2. Click to edit the conne		Tes	t connection	O Integrated aut	hentication	3. Edit the cc	Save Cancel

Screenshot A: Editing SharePoint site's settings

The sites can be also disabled/enabled by 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).



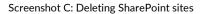
SharePoint c	onnector settings						_		$\times$
Global user									
0	Specify user which w	vill be used to acces	s one or more sites.						
$\sim$	User name:	monika.nevicka@t	ech-arrow.com						
	Password:	****							
	Confirm password:	****							
Sites									
	Url		Login		Enabled				
S 🔑	https://techarrow.sh	narepoint.com/site	monika.nevicka@t	ech-arrow.com	$\checkmark$				
	https://eimdemo1.s	harepoint.com/sit	admin@eimdemo	1.onmicrosoft.com	✓ ◀				
	https://techarrow.sh	narepoint.com/site	global: monika.nev	vicka@tech-arrow.c	$\checkmark$				
	Add new site		Edit site	Delete site					
	Add new site		cait site	Delete site					
Content types									
	Show the content	t type selection dial	og only if required fi	elds are present					
						Sav	e	Cance	d.



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.

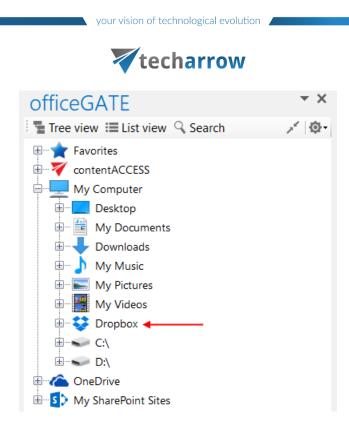


SharePoint c	onnector settings							—		×
Global user										
0	Specify user which w	vill be used to access	one or more sites.							
$\sim$	User name:	monika.nevicka@tech-arrow.com								
	Password:	*****								
	Confirm password:	*****								
Sites	1. Sel	ect the site.								
	Url		Login		Enabled					
S 🔑	https://techarrow.sh	narepoint.com/site	monika.nevicka@te	ch-arrow.com	$\checkmark$					
	https://eimdemo1.s	harepoint.com/sit	admin@eimdemo1	.onmicrosoft.com	$\checkmark$					
	https://techarrow.sh	narepoint.com/site	global: monika.nev	icka@tech-arrow.c	$\checkmark$					
	Add new site	2	Edit site	▲ Delete site						
Content types				2. Click	to delete	e the site.				
				•						
	Show the content	t type selection dialo	g only if required fie	lds are present						
							Sa	/e	Cance	2
							-	I		



#### **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:

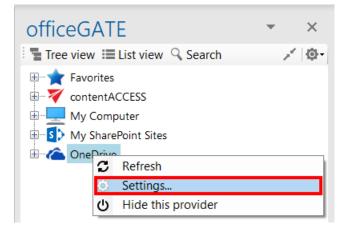
- Personal this node connects you with the online OneDrive system using your personal account (e.g. john.doe@gmail.com)
- Business this node connects you with the online OneDrive for business system using your company account (e.g. john.doe@tech-arrow.com)

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	2l

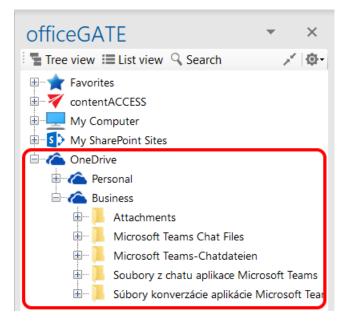
Expand the Personal and Business folders. A Microsoft authentication window will pop up asking you to sign in. Enter your credentials and click "Sign in":

techa	rrow
×	Sign in to your account
1 🗠 🕸 <mark>-</mark> 🖉 G 🕨	officeGATE
Sign in	Work or school, or personal Microsoft account
Use your Microsoft account.	testuser@tech-arrow.com
What's this?	••••••
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
Signing into OneDrive with personal account	Signing into OneDrive for business

your vision of technological evolution

using 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	- 🗆 X
Settings		
	Connect to:	✓ OneDrive
		OneDrive for Business
Sign out all		Save Cancel

# 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 <sup>(a)</sup> 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:

your vision of technological evolution



▼ officeGATE Settings ×	officeGATE			×
General settings	Tree view III List view Favorites Favorites GrowtentACCESS	Set	1. tings nd feedback out	<b>2.</b>
✓ Show officeGATE panel on startup. ✓ Show officeGATE in mail compose and read window.	ia⊡ 🐔 OneDrive			
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.				
Show the item count in the list view				
Number of items to load at a time 50				
Language settings				
English ~				
OK Close	7			

- 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 mail compose and read window: If this option is selected, the officeGATE pane will be displayed automatically in any newly opened email message and in the read window. The Show panel / Hide panel ( ♥) button will be present.
- 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 (4<sup>th</sup>) 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.
- Show the item count in the list view: If this option is checked, officeGATE will display the number of items at the bottom of the pane. It is possible to specify the Number of items to load at a time.
- 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 settings

*Note:* Offline synchronization is currently disabled for the SharePoint provider.

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 <sup>(D)</sup> mark in the officeGATE's panes header bar, choose **Settings...** and switch to "**Offline synchronization**" like on the picture below:

	your vision of technological evolu	ution	
	techarrow		
<ul> <li>officeGATE Settings</li> <li>control officeGATE Settings</li></ul>	×	OfficeGATE Tree view ≣ List view ♀ Favorites	Search Settings
settings	<u> </u>	ContentACCESS     My Computer     OneDrive	Send feedback About
<ul> <li>Enable offline access</li> <li>Offline access will allow you to browse you any network.</li> </ul>	our data when you are not connected to	Personal Business Business My SharePoint Sites	
Enable automatic synchronization every	1 Days ~		
Synchronize only items modified in last Limit space used by offline files to	1 Days ~ 4096 MB		
Statistics			
Synchronization status Synchronized folders Synchronized files Size of all offline files Overall offline database size Last synchronization date	Not running 5 3 82.84 KB 1.78 MB 10/23/2018 2:28:17 PM		

○× @-2.

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.

Close

OK

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.

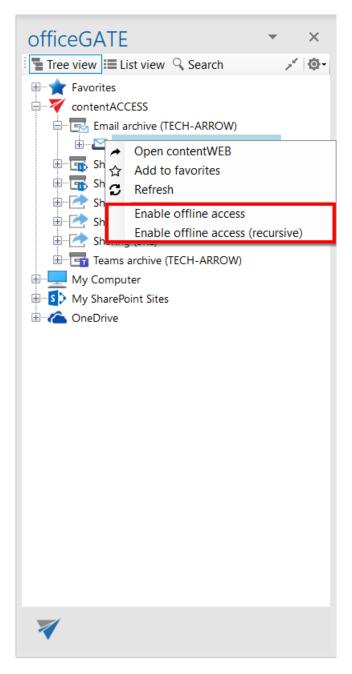
#### Selecting items for offline access

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)".





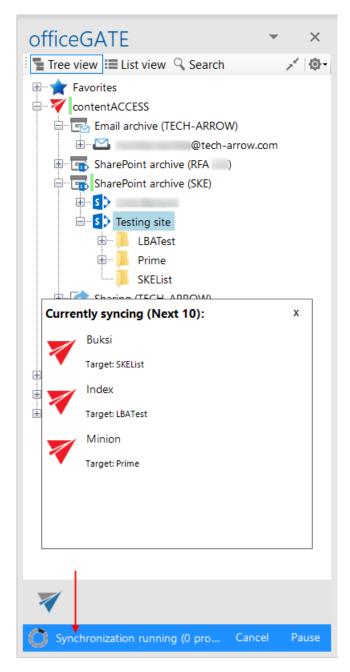
To turn on offline access for a selected file only, locate it in the navigation pane (in list view), open its context menu and select item "Enable offline access":



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	"no 🖻				nil
	"noreply			6/7/2022 10:3	Emil
	"noreply			6/7/2022 10:3	Emil
M	"noreply			6/7/2022 10:3	Emil
M	Möbelix			6/7/2022 10:2	emil
M	"noreply			6/7/2022 9:34	Emil
M	"noreply			6/7/2022 9:25	Emil
M	"Erika Bu	-		6/6/2022 4:40	emil Emil
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Now we will enable offline access (recursive) for our archived SharePoint site called "**Testing site**". 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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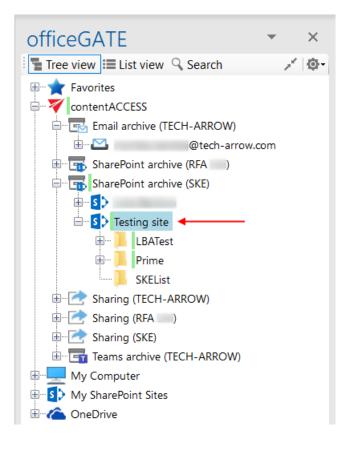
V officeGATE Settings		X
General Providers Synchronization		<ul> <li>CofficeGATE </li> <li>✓ ×</li> <li>✓ Tree view = List view </li> <li>✓ Io·</li> <li>✓ Favorites</li> <li>✓ contentACCESS</li> </ul>
Settings  Enable offline access Offline access will allow you to browse you Enable automatic synchronization every Synchronize only items modified in last Limit space used by offline files to Statistics	I   I   I   Days   I   Days   4096   MB	Email archive (TECH-ARROW) Composition of the second seco
Synchronization status Synchronized folders Synchronized files Size of all offline files Overall offline database size Last synchronization date Clear offline data	Running 9 23 8,09 MB 21,6 MB 2/10/2021 4:11:27 PM	Sharing (KPA     Sharing (KPA     Sharing (SKE)     Sharing (SKE)     My Computer     SMy SharePoint Sites     OneDrive
	OK Close	e
		Synchronization running (20 pr Cancel Pause

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

officeGATE		x
Ĵ	Synchronization completed	

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





officeGAT	E		• ×			
📲 Tree view 🔝	📲 Tree view 🗮 List view 🔍 Search					
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£						
📕 Folder_sub01						
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🗏 New Text Doc	9/18/2020 1:2		16 bytes			

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### Updating the offline items based on the online changes

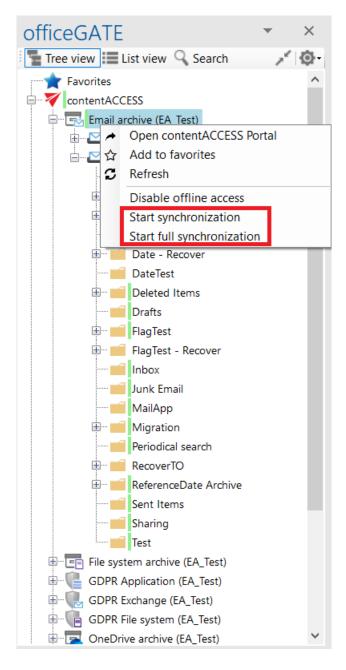
The changes made in a folder/document in the source system can be downloaded to the offline files:

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	ıt
Settings	
Enable offline access Offline access will allow you to browse you any network.	ur data when you are not connected to
Enable automatic synchronization every	1 Days ~
Synchronize only items modified in last	1 Minutes Hours 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



 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.

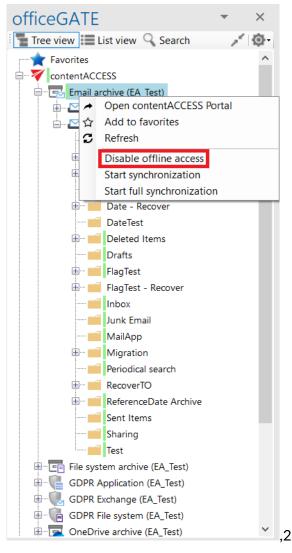




#### **Disabling offline access**

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



officeGATE Settir	ngs	-		×
General settings	Offline synchronization	Dout		
Settings				
Offline access any network.	access will allow you to browse	your data when yo	u are not connected to	
🗸 Enable automa	tic synchronization ever	y 1	Days 🗸	
Synchronize or	nly items modified in last	1	Days 🗸 🗸	
Limit space use	ed by offline files to	4096	MB	
Statistics				
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'	1		OK Close	

Screenshot 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 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 technologica	al evolution		
	<b>Techari</b>	ow		
₩ officeGATE Settings	×			
General Providers Offline synchronization 1.				
About		License details		×
officeGATE	2. License	officeGATE Version 3.0.6		
Version 3.0.6		Premium version		
Copyright © TECH-ARROW, a. s. 2016		* Licensed to:		
TECH-ARROW, a.s.		License key: Valid till:	11/28/2025	
Premium version		valia cini	11/20/2025	
officeGATE is a free MS Outlook add-in connecti with your local file-system, SharePoint Online, O and many other providers.		roviders contentACCESS PW Perceptive Workplace My Computer		
	· · · · · · · · · · · · · · · · · · ·	ConeDrive		
<b>Techarrow</b>		My SharePoint Sites		
Your vision of technological evolution.				
OK	Close	Change license 3.		ОК
🧭 contentGATE Data Migratio	n			

There are two options how to activate a license key:



License Activation Wizard	_			×
Enter your license key				
Welcome to the license activation wizard. Please enter your license key f select the activation method.	or the	e pro	duct and	
License key		- [	-	
		<u>Prox</u> y	<u>settings</u>	5
Online activation (internet access required)				
O Offline activation				
Nex	t		Cance	

- 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.



cense Activation Wizard	License Activation Wizard
Offline activation	Offline activation
lease send the license request information to the Tech-Arrow sales epartment based on what we can generate the license activation data for	Please send the license request information to the Tech-Arrow sales department based on what we can generate the license activation data for
icense request information	License request information
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Load from file Back Next Cancel	click next to complete the activation process Back Next Cancel

If the officeGATE is bought from the store, then the License details window contains the following information:

- 1. Licensed to owner of the license
- 2. License status valid or not (expired)

3. **Subscription expiration** and **License expiration** – the **Subscription expiration** shows when will the free trial end. After this, the user can use the same license key for 7 days before the license expires (**License expiration**). The 7-day period provides the time for the user to buy the required version of the product. The license key can be renewed by purchasing from the <u>store</u>.

4. User's license key

5. Manage my subcription – opens the user's account in the TECH-ARROW store

6. Change license – the user can activate a different license key in the License Activation Wizard window.

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V officeGATE Set				×
General Provider settings	s Offline synchronization			
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6. Chan	Providers My Computer My SharePoint Sit ConeDrive ge license	es	Γ	ОК
			ОК	Close

*Note:* The providers are accessible based on the type of the license key. The contentACCESS provider is not supported with the Subscription-based version, only the My Computer, My SharePoint Sites and OneDrive is available here.

# 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.

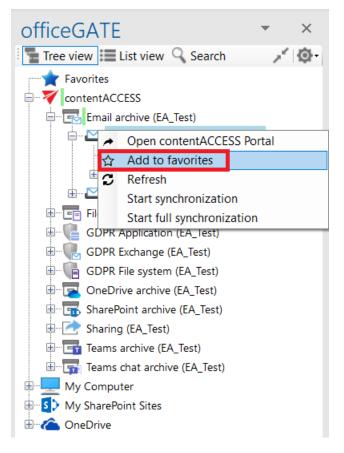


#### **Setting favorites**

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 1<sup>st</sup> node) in the officeGATE's tree view collects your favorites.

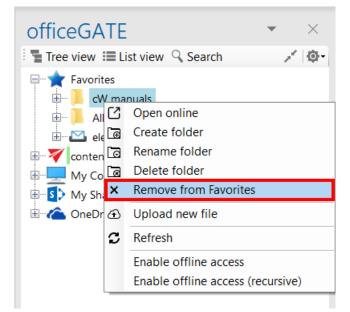
*Note*: The tooltips of Favorites show the parent folder, which makes the navigation even easier.

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.





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

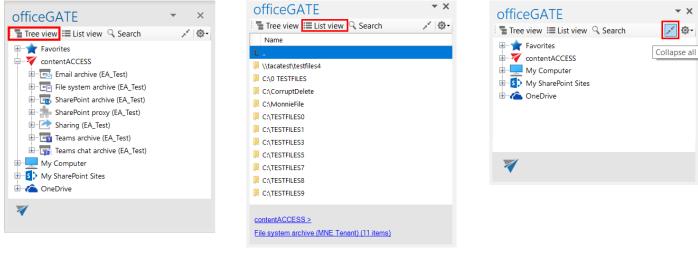
There are 3 main views available in the officeGATE's status pane:

- ✓ 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>).

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Screenshot A: Tree view

Screenshot B: List view

Screenshot C: Collapse all

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.

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.



officeGATE switch to list view * *	officeGAT	E switch to	o parent loca	tion ×
Tree view 🗄 List view 🔍 Search 💉 💁	📲 Tree view 📒	List view 🔍 S	earch	× @-
🕀 🕆 🛉 Favorites	FileName	Size	Folder	CreationD
ian variable and the second s	1			
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File system archive (MNE Tenant)	돈 960x0.jpg	173.67 KB	C:\TESTFILES3	11/3/2017
C:\TESTFILES3	\overline a-1024x768.jpg	66.54 KB	C:\TESTFILES3	11/3/2017
C:\TESTFILES5	\overline a35bb6d3af7c	308.00 KB	C:\TESTFILES3	11/3/2017
C:\TESTFILES7 folder content	🚬 bdb3d7041f7	48.79 KB	C:\TESTFILES3	11/3/2017
C:\TESTFILES8	🖳 business and	52.37 KB	C:\TESTFILES3	11/3/2017
C:\TESTFILES9	🥦 camera.png	646.51 KB	C:\TESTFILES3	11/3/2017
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	<			>
	contentACCESS >	<b>▲</b>		<u>&gt;</u>
·•	C:\TESTFILES3 (9	item: fol	der path	

#### 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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Name	Modified 🔺	N
		В
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	
Test case for officeGATE setup.msg		
officeGATE setup test case.xls	10/26/2016 12:09 PM	
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
BAtestFILE.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
		>

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

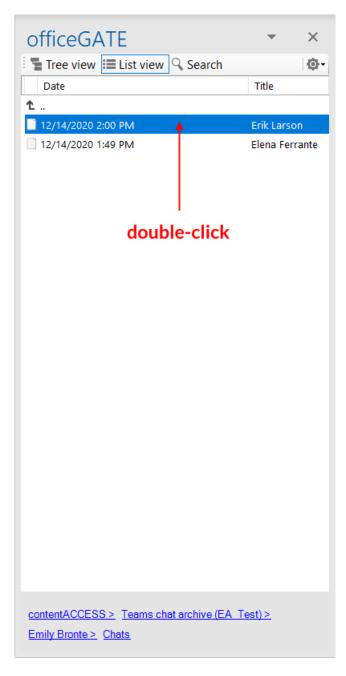
officeGATE	▼ 3	×
🗄 🖥 Tree view 🗮 List view 🔍 Sear	rch 💉 🧔	<u>}-</u>
Name	Modified -	N B
1		
📜 Subfolder1	9/28/2016 10:20 AM	E¢
📜 Subfolder2	10/4/2016 12:16 PM	Ec
📜 MNE testing	11/21/2016 10:45 AM	Di
officeGATE.db	8/5/2016 9:21 AM	Ec
officeGATE1.db	8/5/2016 9:54 AM	Ec
searchingwithofficegate_eba.docx	9/13/2016 1:19 PM	Εc
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
🖂 Test 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 &gt;</u> <u>Testing site &gt;</u> <u>1</u> EBA (16 items)	<u>est Cases &gt; Empty &gt;</u>	

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

#### Double-click on contentACCESS items in List view

When you are in list view and double-click on a contentCCESS item, its preview opens (the context menu option **Properties** works the same).





From this preview, it is possible to **Open** the original item or **Close** the preview.



officeGATE	r	×
🗄 🔚 Tree view 🗮 List view 🔍 Search		¢-
Sharing Item is shared 4 times. <u>Show</u>	<u>/ more</u>	Â
lcon		
post.png		
Erik Larson 14/12/2020 14:00:32 Emily Bronte		1
<b>Erik Larson</b> 14/12/2020 14:00:27		
A 70 year old photographic mystery.docx Agnes Grey wikipedia.pdf Bad Michael Jackson.docx Can't Help Fallin in Love by Elvis Presley.txt Earth Song lyrics.txt Elvis now Elvis Presley.pdf		
Open 🛛 🗸	Close	Ď

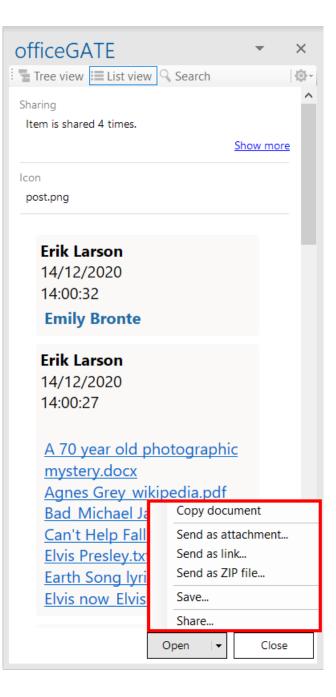
Screenshot: Preview and details of a Teams chat archive item

If you click on the little arrow on the **Open** button, the following options for the item appear:

- Copy document
- Send as attachment...



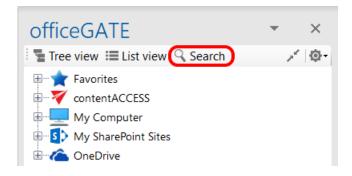
- Send as link...
- Send as ZIP file...
- Save...
- Share...





# 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).



officeGAT	E	* ×
Tree view	List view 🤍 Search	(Q) <del>-</del>
Search in		
All providers		$\sim$
Keyword		
virtual drive		✓ 𝒫 Search
83 document(s) for	und containing 'virtual dr	rive' in All provi
Name	Provider	^
🚾 NOTES FOR	My Computer	
📧 Special links.txt	My Computer	
💇 contentACCE	My Computer	
📕 contentACCE	My Computer	
discontentacces	My Computer	
🗐 contentacces	My Computer	
🕅 contentACCE	My Computer	
📕 contentACCE	My Computer	
🗐 contentacces	My Computer	
🗟 contentacces	My Computer	
🗐 contentacces	My Computer	
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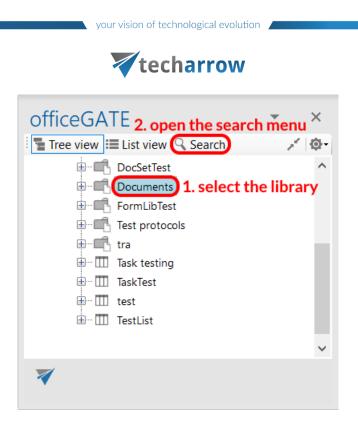
b) In one of the connected providers → in this case select the desired provider from the "Location" dropdown list, enter the demanded keyword and click "Search".



officeGAT		
Tree view :=	List view 🤇 Search	<u>ې</u>
Search in		
contentACCESS		$\sim$
Keyword		
virtual	~	Ø Search
15 document(s) for	und containing 'virtual' in conte	entACCES.
Model	Entity	Folder
📴 Email archive	@tech-arrow.com	Private\E
GDPRExchan	emily.bronte@tech-arrow.com	Sent Item
📴 GDPRExchan	erik.larson@tech-arrow.com	Inbox
🧏 File system a		C:\EATest
🖭 Email archive		
<b>1</b> 09.02.2021 1		Sharing
18.03.2021 1		Sharing
4.02.2021 1		Sharing
19.03.2021 1		Sharing
18.03.2021 1		Sharing
108.02.2021 9	pdf	Sharing
<		>

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 ( $\Im$ ):



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



officeGAT	E	-	×
Tree view 🔳	List view 🤍 Search		<u>ې</u> ب
Search in			
My SharePoint Site	es\Testing site\Documents		$\sim$
-			
Keyword		_	
contentACCESS	~	р <sub>Se</sub>	arch
11 document(s) for	und containing 'contentACC	ESS' in N	/ly S
Name	Path		
📕 SGP - conten	https://techarrow.sharepoir	nt.com/si	tes/tes
GATE.content	https://techarrow.sharepoir	nt.com/si	tes/tes
GATE.content	https://techarrow.sharepoir	nt.com/si	tes/tes
📴 New content	https://techarrow.sharepoir	nt.com/si	tes/tes
🤨 contentACCE	https://techarrow.sharepoir	nt.com/si	tes/tes
TechArrow Te	https://techarrow.sharepoir	nt.com/si	tes/tes
🕂 officeGATE pr	https://techarrow.sharepoir	nt.com/si	tes/tes
🕂 New content	https://techarrow.sharepoir	nt.com/si	tes/tes
🕂 Give us some	https://techarrow.sharepoir	nt.com/si	tes/tes
📧 DebugLog.txt	https://techarrow.sharepoir	nt.com/si	tes/tes
🔤 fields.txt	https://techarrow.sharepoir	nt.com/si	tes/tes
<			>

11 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.



officeGAT	E		•	×
Tree view	List view 🤍 Search			¢-
Search in				
My Computer		$\sim$	Opt	ions
Keyword				
virtual drive		$\sim$	р <sub>Sea</sub>	arch
50 document(s) for	und containing 'virtual dri	ve' ir	n My C	
Name	Path			^
💹 NOTES FOR	C:\Users\MNE\TECH-ARF	ROM	a.s\Te	cha
Special links.txt	C:\Users\MNE\TECH-ARF	NON	a.s\Te	cha
🗷 contentACCE	C:\Users\MNE\TECH-ARF	NON	a.s\Te	cha
contentACCE	C:\Users\MNE\TECH-ARF	NON	a.s\Te	cha
🕅 contentACCE	C:\Users\MNE\TECH-ARF	NON	a.s\Te	cha
📕 contentACCE	C:\Users\MNE\TECH-ARF	NOW	a.s\Te	cha
contentacces	C:\Users\MNE\TECH-ARF	NON	a.s\Te	cha
contentacces	C:\Users\MNE\TECH-ARF	NOW	a.s\Te	cha 🖉
<				· `
7				

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



6 232 items indexed ↓ Indexing complete. Index these locations: Included Locations Included Locations Internet Explorer History Microsoft Outlook Offline Files Start Menu Users AppData; AppData Modify	-			
Indexing complete.         Index these locations:         Internet Explorer History         Internet Explorer         I	lndexing C	Options		×
Included Locations Internet Explorer History Microsoft Outlook Offline Files Start Menu Users AppData; AppData Modify Modify Advanced How does indexing affect searches? Troubleshoot search and indexing	æ	Indexing complete.		
How does indexing affect searches? Troubleshoot search and indexing	Included Locat Internet Ex Microsoft C Offline File Istart Menu	ions plorer History Dutlook S		
	How does index	ing affect searches?	Pause	
Close				Close



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

- Send as attachment\*
- Send as ZIP file\*
- Save document(s) locally\*
- Copy document(s) \*
- Open\*
- Open contentACCESS Portal\*

 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.

Share \*

officeGATE × Tree view 🔚 List view 🔍 Search <u>ه</u>-Search in contentACCESS  $\sim$ Keyword 🔎 Search test 1046 document(s) found containing 'test' in contentACCESS. Model Entity Folder Title ^ Sharing emily.bronte... My organizat... Test n Sharing emily.bronte... My organizat... CAEA 🚡 Sharing emily.bronte... My organizat... New I 1 Sharing emily.bronte... My organizat... TEST f 🖂 Sharing emily.bronte... My organizat... Test n 9 Sharing emily.bronte... My organizat... Test n Sharing emily.bronte... My organizat... Test Teams archive CAEATest Tea... General Lyndc 😓 File system a... C:\EATest\_FS... C:\EATest\_FS... High : ¥ Send as attachment Test n Send as ZIP file 1 Irelan 2 Save document(s) locally NSC [ FS.... 2 Copy document(s) FS... 2016-Ę TEST 1 🖸 Open Ę TEST F Open contentACCESS Portal Ę Test n [2] Open parent directory Ę Test n Share 1 File system a... C:\EAIest\_FS... C:\EAIest\_FS... The b File system a... C:\EATest\_FS... C:\EATest\_FS... 1001ł 😓 File system a... C:\EATest FS... C:\EATest FS... Irelan 🚰 File system a... C:\EATest\_FS... C:\EATest\_FS... The b ∨ < >

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

#### Searching with Search suggestions

If the **Search suggestions** are enabled in <u>System</u> settings for the contentACCESS server officeGATE is connected to, system generate search suggestions. Search suggestions are possible search terms related to



what you are looking for and are generated from the document contents, thus only those terms will be suggested, which are related to at least one of your documents.

officeGATE	*	×
Tree view 🗮 List view 🤇 Search		<u>ې</u>
Search in		
contentACCESS\Email archive (EA_Test)		$\sim$
Keyword		
Test	₽ Se	earch
Test	ntentA	CCE
test		
testing		^
Testmail		
Inoreply@tec Periodical search result		
🕂 🛛 emily.bronte OG Search		

Searching with Hit highlighting

If the **Hit highlighting** is enabled in <u>System</u> settings for the contentACCESS server officeGATE is connected to, the located words will be highlighted with yellow in the search results.



officeGATE	-	×
Participants Early, <mark>Emily</mark> Bronte < <mark>emily</mark> .bronte	<u>Show more</u>	^
Subject You've joined the Early_Group group		I
Date 10/2/2020 2:53:55 PM		
Unread False		
Inline Attachments 14 inline attachments	Show more	
☑ Office 365 Work Brilli	antly Together	
<b>E</b>		~
Open	✓ Close	

### 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.



All search conditions can be negated using the <u>NOT</u> keyword. The keyword is **case sensitive**, so it must be **always written in UPPERCASE**. The <u>exclamation mark "!"</u> is a shorter version of the NOT keyword and has the exact same function. The syntax may look like as follows:

### For freetext search:

- NOT value
- Ivalue

### For property search:

- Subject:(NOT test)
- Subject:(!test)

You can also combine the NOT operator with:

- phrase queries: NOT "this is a test"
- regex queries: filename:(NOT \*\*[0-9]{3}\.txt)
- wildcard queries: NOT test\*
- range queries: Size:(NOT 1M,2M) OR Date:(NOT 2020-01-01,2020-12-31)

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)



**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



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



Cc:	(string)	condition on addresses in CC tag of the email
Folder:	(string)	condition on folder path; possible to find emails only in 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:

your vision of technological evolution 🔏



Providers	Operations on folders/libraries using	
Providers	their context menu	
contentACCESS	<ul> <li>✓ Open contentACCESS Portal</li> <li>✓ Add to favorites</li> <li>✓ Properties</li> <li>✓ Upload new file</li> <li>✓ Refresh</li> <li>✓ Enable offline access</li> <li>✓ Enable offline access (recursive)</li> <li>✓ Share</li> </ul>	officeGATE   Tree view List view Search Favorites contentACCESS Email archive (EA_Test) Poper contentACCESS Portal Add to favorites Properties Upload new file File Gi File File ContentACCESS Properties Upload new file
My Computer (including local Dropbox and OneDrive folders)	<ul> <li>✓ Open</li> <li>✓ Create folder</li> <li>✓ Rename folder</li> <li>✓ Delete folder</li> <li>✓ Add to favorites</li> <li>✓ Upload new file</li> <li>✓ Refresh</li> </ul>	Image: Search   Favorites Favorites Favorites Former and the search Favorites Former and the search Favorites Former and the search <p< td=""></p<>



#### Library:

- New (with submenu items based on the selected site/document set/folder/list templates)
- ✓ Open online
- ✓ Add to favorites
- ✓ Upload new file
- ✓ Refresh

#### Folder/document set:

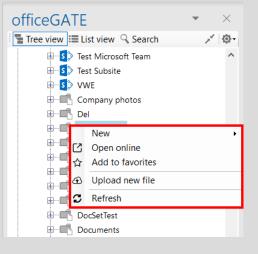
 New (with submenu items based on the selected site/document set/folder/list templates)

### SharePoint

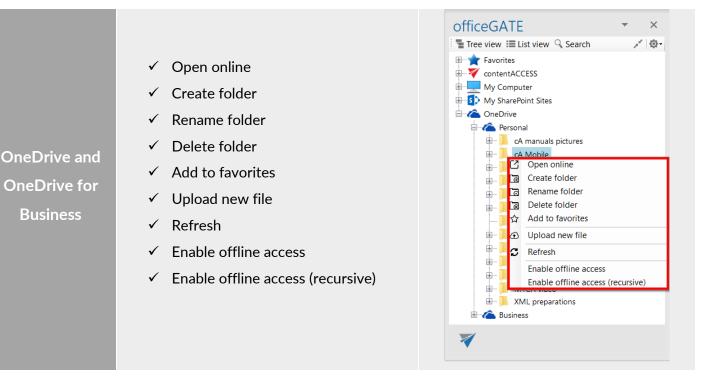
- ✓ Open online
  - ✓ Rename folder
  - ✓ Delete folder
  - ✓ Add to favorites
  - ✓ Upload new file
  - ✓ Refresh

#### List:

- New (with submenu items based on the selected site/document set/folder/list templates)
- ✓ Open online
- Add to favorites
- ✓ Refresh







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	<ul> <li>✓ Open</li> <li>✓ Open contentACCESS Portal</li> <li>✓ Send as attachment</li> <li>✓ Send as ZIP file</li> <li>✓ Properties</li> <li>✓ Save document(s) locally</li> <li>✓ Copy document(s)</li> <li>✓ Create folder</li> <li>✓ Refresh</li> <li>✓ Upload new file</li> <li>✓ Enable offline access</li> <li>✓ Share</li> </ul>	officeGATE     Tree view     List view     Search     File name     Size   Folder     Creation      File name      Size   Folder      Creation      File name      Sub01   Folder1_Sub01    Folder1_Sub02      Adventure an     16 KB   Folder_01   8/12/2021        Blue He   Open   O
My computer (including local Dropbox and OneDrive files)	<ul> <li>Open</li> <li>Send as attachment</li> <li>Send as link</li> <li>Send as ZIP file</li> <li>Save document(s) locally</li> <li>Copy document(s)</li> <li>Delete document</li> <li>Rename document</li> <li>Create folder</li> <li>Refresh</li> <li>Upload new file</li> <li>Share</li> </ul>	OfficeGATE       ×         Tree view       List view       Search         Name       Type       Last modified       Size         100       Open       0 Ki         100       Send as attachment       0 Ki         100       Send as ZIP file       7 Ki         1560       Save document(s) locally       7 Ki         1010       Copy document(s)       5 Ki         102       Send as ZIP file       5 Ki         103       Copy document(s)       5 Ki         104       Copy document       5 Ki         105       Save document       8 Ki         104       Copy document       8 Ki         2010       Create folder       8 Ki         2010       Refresh       8 Ki         2010       Share       8 Mi         2010       Share       8 Mi         2010       Share       8 Mi         2010       Share       8 Mi         2010       Share       8 Mi



	<ul> <li>New (with submenu items based on the</li> </ul>	
	selected site/document set/folder/list	office CATE
	templates)	officeGATE
	✓ Open online	Name Mo
	✓ Send as attachment	New item fold 5/1
	✓ Send as link	Bakonybél 5k 5/1
	✓ Send as ZIP file	■ Bookxisx 2/1 ■ Chang New
	✓ Properties	Docur C Open onli
Sharepoint	✓ Save document(s) locally	DocuT 😼 Send as li 📾 Excelit 🖼 Send as Z
	✓ Copy document(s)	Micro Properties
	✓ Delete document	Monn 🛓 Save docu
	<ul> <li>✓ Rename document</li> </ul>	PPT.pl 🔒 Delete do
	✓ Refresh	Rename c Refresh
	<ul> <li>✓ Upload new file</li> </ul>	RE_ IN □ RE_ M Upload ne
		🔍 SP_cal 🛃 Share
	✓ Share	
	<ul> <li>✓ Open online</li> </ul>	
	<ul> <li>✓ Send as attachment</li> </ul>	officeGATE
	✓ Send as link	Name A Exten
	✓ Send as ZIP file	↑ ▶ Pictures
	✓ Save document(s) locally	<b>XML</b>
OneDrive and	✓ Copy document(s)	Content CCC3 dox
	✓ Delete document	🔤 content 🔀 Send as I
OneDrive for	✓ Rename document	Image: Content       Image: Content       Send as 2         Image: Content       ▲       Save door
Business	✓ Create folder	content 🗖 Copy do B Delete d
	✓ Refresh	Rename
	✓ Upload new file	Create for Refresh
	<ul> <li>✓ Enable offline access</li> </ul>	⊕ Upload r
	✓ Share	Enable o Share

× view 🔍 Search <del>ن</del>ه-Vodified Modified By /18/2020 2:0... /11/2020 3:3... /15/2020 12:... nline attachment link ZIP file es ut document cument(s) locally ocument(s) document document new file /15/2020 9:2...

officeGATE 🔹				
Tree view	w 🔳 List view 🔍	Search	Ø	
Name	<ul> <li>Extension</li> </ul>	Last modified	Size	
1L				
📕 Pictures		7/16/2018 1:1		
📕 XML		5/23/2018 1:4		
	CES docx	12/4/2017 4:2	5,22 MB	
🛃 content			мв	
	Send as attachn	nent	мв	
		Send as link		
_		Send as ZIP file		
	Save document(s) locally MB			
🖻 content 🗖	Copy document(s) MB			
	Delete docume	Delete document		
Ē	Rename docum	ent		
<u>Cæ</u>	Create folder	Create folder		
C	Refresh			
Œ	Upload new file			
	Enable offline access			
	Share			



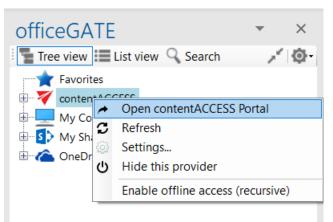
For instructions on everyday use cases of working with files in officeGATE, read the below described topics. Select your provider from the officeGATE pane and connect to it if it's not connected automatically. Then switch to list view, locate the file(s) that you want to work with, and open its context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

## Open contentACCESS Portal

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

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

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

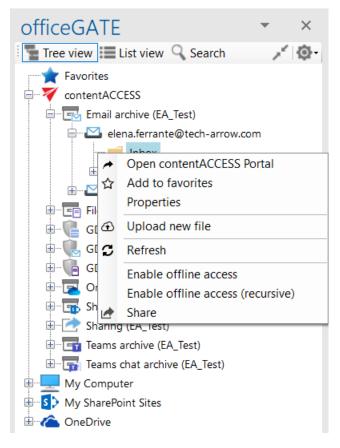


 entity node - opens the selected entity (mailbox, file archive root, etc. - depending on model type) in contentACCESS Portal



officeGATE		•	×		
Tree view	st view 🔍 Search	1	¢۲-		
🔶 🔶 Favorites					
contentACCE	SS				
	hivo (FA Tost)				
🗄 📑 🖬 🥕 🤇	Open contentACCESS Por	rtal			
⊕ 💽 G 🛣 /	Add to favorites				
	Refresh				
🖶 🖷 GL 🛛 I	Enable offline access (rec	ursive)	)		
🕮 🔽 OneDrive archive (EA_Test)					
🗄 🔚 🖬 SharePoint archive (EA_Test)					
🕀 🗁 🗄 🗄	🕮 🗁 Sharing (EA_Test)				
🗄 🖃 🖬 Teams archive (EA_Test)					
🗄 🐨 🏣 Teams chat archive (EA_Test)					
🗄 🖳 My Computer					
🗄 🚺 My SharePoint Sites					
🗄 🗠 🏠 OneDrive					

folder node - opens the selected folder in contentACCESS Portal



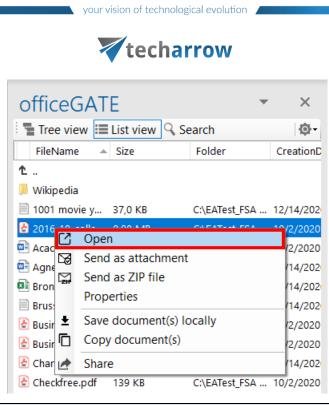


document node - shows the selected document (email, file...) in contentACCESS Portal

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# 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** 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.



*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" 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 files as attachments

If you want to send the file itself, right click on the file and choose  $\square$  Send as attachment from its context menu. The files will be automatically attached to a newly opened email. It is possible to select multiple files to attach.



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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.

- 1. 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.



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		Szilvia Kelemen
1: Select the files and click on "Send a	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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## 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.

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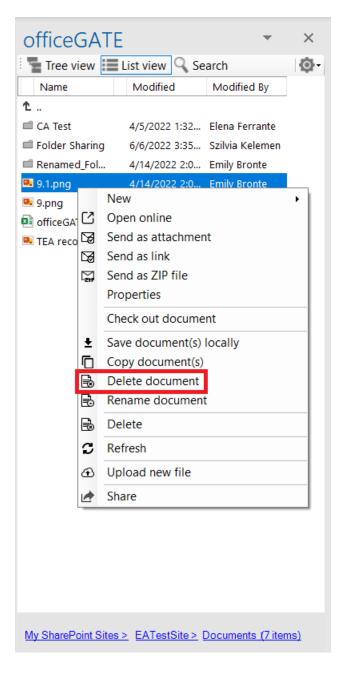
Screenshot A: Copy document(s) from a source location

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**. This function is available only in providers My computer, My SharePoint sites, and OneDrive.





## 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)

There are two ways to create a new folder.

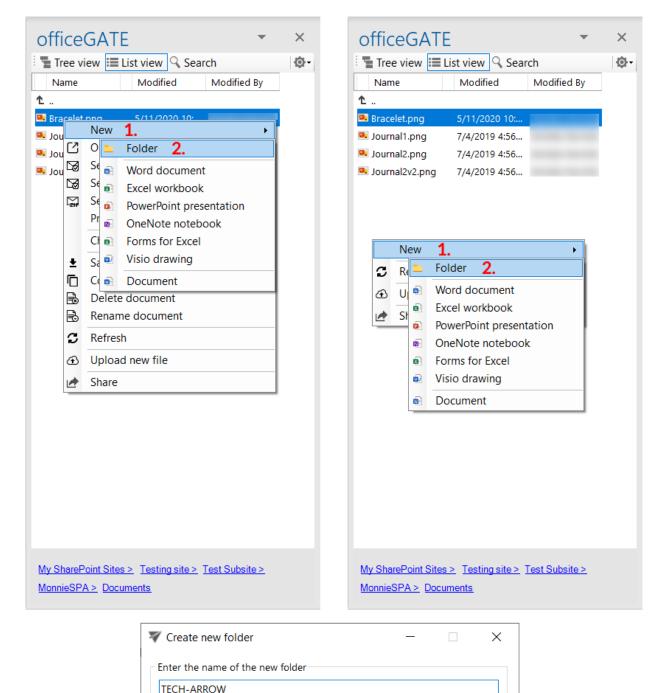
First way is to select **Create folder** option from the item's context menu (or switch to list view and right click into the navigation pane). The **Create new folder** dialog opens. Type in the folder's name and click **OK**.

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Second way works for **MySharePoint Sites** only. First, select **New** (1) from the item's context menu (or switch to list view and right click into the navigation pane). Then select **Folder** (2) from the available options. The **Create new folder** dialog opens. Type in the folder's name and click **OK**.



OK

Cancel



## 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:



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## Sharing files and folders directly from MS Outlook

*Important:* Cross tenant sharing is **NOT** allowed. If the user you are logged in with is assigned to Tenant 1, then you cannot share data from Tenant 2, even if you have access to that data. You can view the sharing details but cannot share the items.



#### Sharing with contentACCESS version 4.2 or older

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.

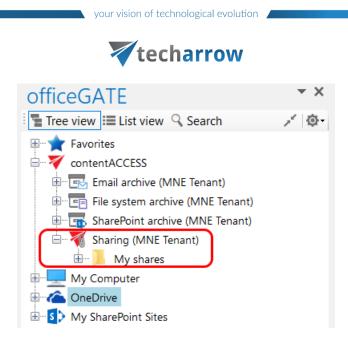
**3.** Configure the values (download count and expiration date) of sharing the files. This option is available in the contentACCESS connector settings, in the Sharing section. The values can be changed directly from the upload dialog as well (described later).

your vision of technological evolution



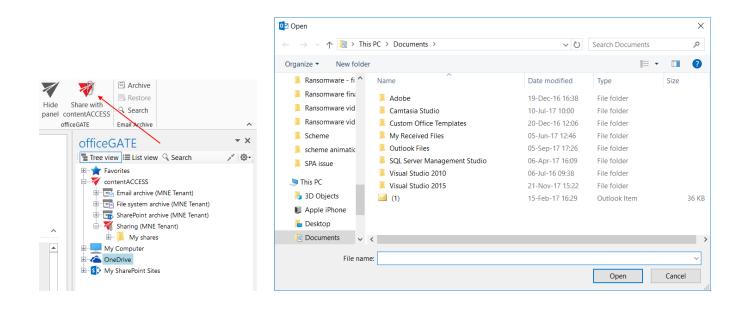
contentACCES	S connector settings				_		×
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After successful connection expand the contentACCESS node. The sharing plugin is located under contentACCESS node in the officeGATE pane. The shared files will be saved into the folder located under this node.



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

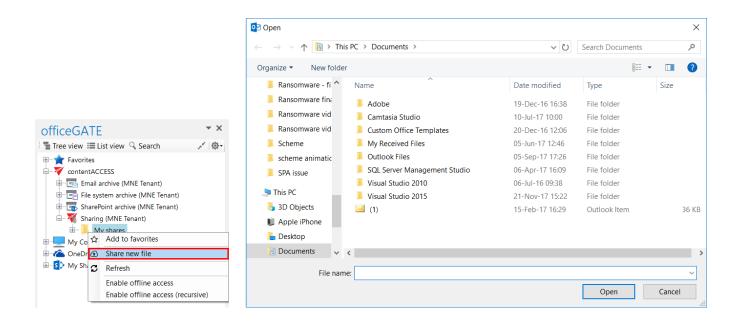
a) **From the toolbar**: Click on the "Share with contentACCESS" button in the MS Outlook toolbar and locate the file that needs to be shared. Click "Open". The main advantage of this first option is, that the user does not have to locate the Sharing plugin in the pane.



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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".



**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.



Target         My shares         Document         Name       C:\Users\mne\Desktop\Monika2\Obrázky\Photoshop\Mojito bubbletea\S         Content type       Advanced Sharing	56f9b2721	f0ef1.imag
Document Name C:\Users\mne\Desktop\Monika2\Obrázky\Photoshop\Mojito bubbletea\5	56f9b272	f0ef1.imag
Name C:\Users\mne\Desktop\Monika2\Obrázky\Photoshop\Mojito bubbletea\5	56f9b272	f0ef1.imag
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Expiration date * Thursday , November 16, 2 $\sim$		
Download limit * 1 0 = no limit		
Save as default		

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:



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Sharing with contentACCESS version newer than 4.2

An easy way to share big files that cannot be sent as attachments is to use the **Share** option, which creates a sharing link pointing to the selected items. The link can be then sent to other users. This saves a lot of time and space, as the user doesn't need to send invitations, use other applications nor send large attachments.

The following steps must be done before using the **Share** function using officeGATE:

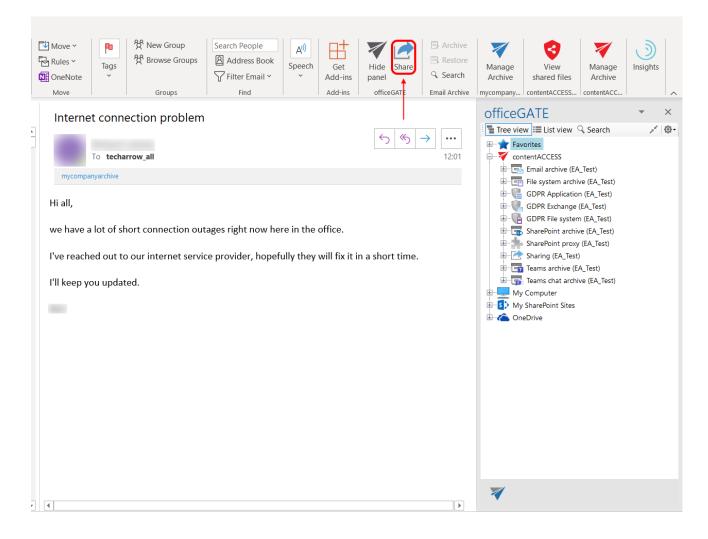
 Configure the Sharing job in contentACCESS. The Sharing job can be configured in System → Services → Sharing job, in the Central Administration interface of contentACCESS (more information here).



Configure the Sharing settings in contentACCESS. The Sharing settings can be configured in System → Services → Sharing settings, in the Central Administration interface of contentACCESS (more information here).

Then, after successfully connecting to contentACCESS, you will be able to use the **Share** function. Items can be shared from officeGATE from the following places (they all work the same way):

1. The Share button in the toolbar



#### 2. From the context menu of the search results when using the Email archive buttons



Share to Teams Teams	Quick Steps ~ Quick Is the archive	Move v	Tags	Groups	P Find *	Read Aloud Speech	Translate Language	Get Add-ins Add-ins	Hide Share panel officeGATE	Archive Restore Search Email Archive	Manage Archive contentAC
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434 document(s) found in all mailboxes.

	From	Subject		Date 👻	То	Folder	Mailbox	^
	Erika Bugár <erika.bugar@t< td=""><td>teamsTALK- meeting butto</td><td>on test</td><td>5/4/2022 10:20:2</td><td>Erno Rubik <erno< td=""><td>Deleted Items</td><td>emily.bronte@tec</td><td></td></erno<></td></erika.bugar@t<>	teamsTALK- meeting butto	on test	5/4/2022 10:20:2	Erno Rubik <erno< td=""><td>Deleted Items</td><td>emily.bronte@tec</td><td></td></erno<>	Deleted Items	emily.bronte@tec	
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### 3. From the context menu of the items in List view

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4. From the context menu of the search results



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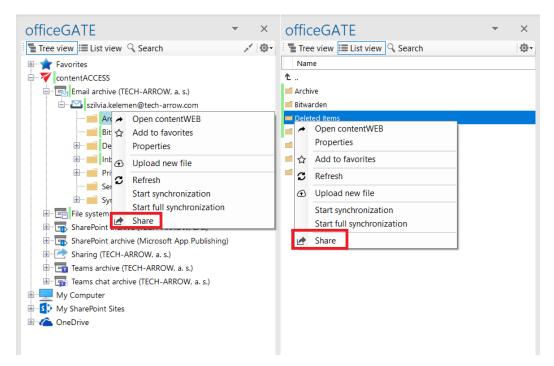
5. Via the Share option when viewing the Properties of an item



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It is also possible to **share folders** from the context menu of the folders in Tree view and List view.





After clicking on the Share option, the Share with contentACCESS view opens.

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Share		Share	
✓ Files to share	^	✓ Files to share	^
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Recipients: erik.larson@tech-arrow.com ~ + -		Recipients only	
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Recipients only		Expires in 1	📥 day
O My organization		3/23/2022	-
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<ul> <li>Sharing options</li> </ul>	~	✓ Notify me about the downloads	
Share 🕞 Cance	2l	Remember these settings	- 1
Share via Outlook			~
Share and send emai Share and get link		Share	Cancel

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# **V**techarrow

In the section **Files to share**, there are items you selected for sharing. In case of using the toolbar **Share** button, you will need to browse and add items by clicking on the **+Add** button, or by **Drag&Dropping** an item into the field. In the case of folder sharing, you can include the subfolders with the folder icon or remove the selected folders from the list.

In section **Share with**, specify the recipient you would like to share the files with into the **Recipients** field and click on +. This needs to be done for each recipient separately. Then, specify who would you like to make the item(s) accessible for:

- Recipients only even if the email with the link is forwarded, only the recipients will be able to access the shared item(s)
- My organization only people from your organization (specified in Central Administration -> System
   -> Services -> Sharing settings) will be able to access the shared item(s)
- **Public** anyone with the link will be able to access the shared item(s)

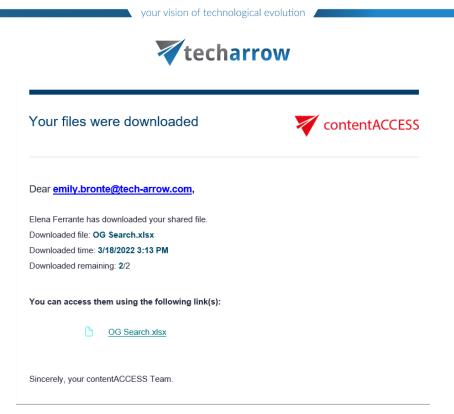
In section **Options**, specify how many days do you want the item(s) to **expire in** or select the date from the calendar. It is also possible to **limit the number of downloads**, based on the option selected in **Share with**:

- Recipients number of downloads per recipient
- My organization number of downloads per user
- Public number of downloads together

*Note:* The folder sharing works with Recipients and My organization only.

With the **Notify me about the downloads** function, the owner can get information about the downloads from the recipients' side. As soon as the users download the shared item, a notification email will be sent to the owner with the following information:

- User, who downloaded the item
- Downloaded file
- Downloaded time
- Downloaded remaining



You can also save these sharing settings for future use by checking the **Remember these settings** checkbox. That way you won't need to fill in the **Sharing options** next time. Choose one of the 3 ways to share:

Share via Outlook – links to the shared files are inserted into the body of the email



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Paste	Basic Text *	Options     Format Text     Review     Help     Acrobat     O Tell me what you want to do       Include     Include     Image     Image     Image     Image     Image       Attach File     Image     Image     Image     Image     Image       Voice     Sensitivity     Sensitivity     officeGATE     Image     Image       Adobe Acrobat     Voice     Sensitivity     officeGATE     Image     Image		View Templates My Templates
Send	From V To Cc	@tech-arrow.com; @tech-arrow.com	OfficeGATE Tree view :≡ List view ♀ Search Favorites ✓ contentACCESS My Computer S My SharePoint Sites ✓ OneDrive	✓ ×
oG upd 02.p oG upd 01.p Jannas.jpg (Shared file(s	ong	le until '16/02/2021 23:59:59' and can be downloaded 2 time(s).)		
•			*	

Share and send mail – lets you write a message in the Share with contentACCESS window; then click
on Send to send the email (links are also inserted into the body); to use this option, first at least one
recipient must be specified, since the notification email is sent via contentACCESS



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Share with contentACCESS			
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Hi,		^	
I am sending you the requested files.			
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	Send	Cancel	

 Share and get link – opens the List of names and links of the shared items that you can copy and send to the recipients; to copy all links at once, click on the Copy all button



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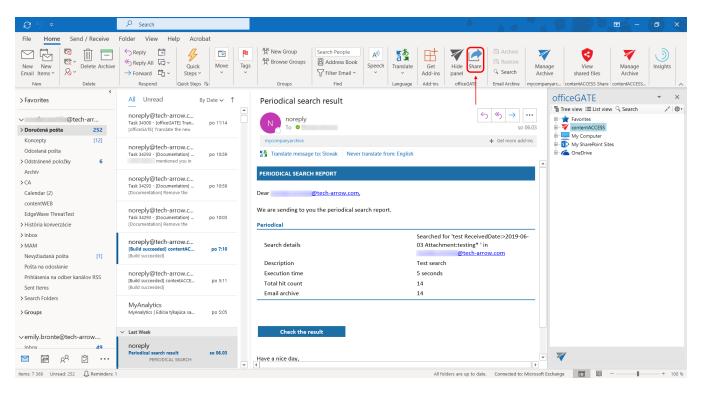
#### Sharing possibilities

In the section above, we explained where it is possible to find the **Share** option and general sharing details. In this section, we would like to show you more in details how sharing from different places/providers work. In all cases, you must first be **logged in to contentACCESS**.



#### Sharing from local file system

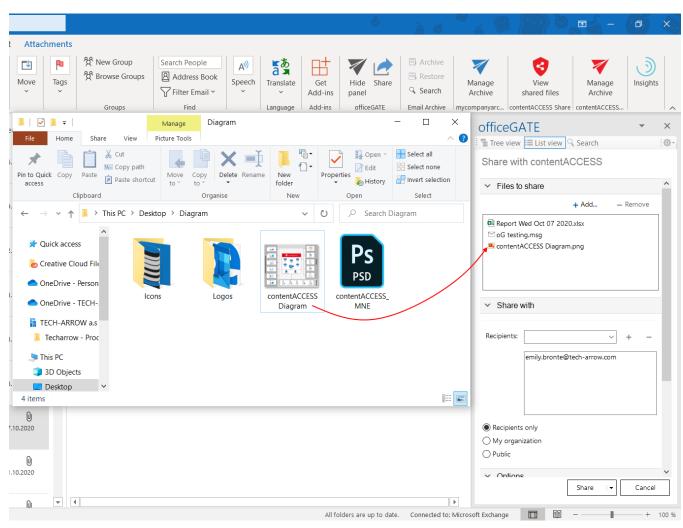
First, click on the Share button in the toolbar.



Click on the **+Add** button to browse your local files, or **Drag&Drop** local files from the **File explorer** to the **Files to share** field.







Screenshot: Drag&Drop of a local file

Fill in the rest of the sharing options based on the section above.

#### Sharing email attachments or whole email/Outlook item

First, click on the **Share** button in the toolbar.



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∽emily.bronte@tech-arrow	✓ Last Week noreply	Check the result
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Items: 7 369 Unread: 252 💭 Reminders: 1	1	All folders are up to date. Connected to: Microsoft Exchange 🔟 🕮 – 📕 + 100 %

## Then, Drag&Drop the Outlook item/email or attachment(s) to the Files to share field.

<b>∂</b> 9 ₹	⊘ Search	
	Folder View Help Acrobat Attachments	
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Archív ≻ CA Calendar (2)	Finance FW: MultiSport - Už máte svoj 22.10.2020 From:	Image: Storage to: Slovak     Never translate from: English       oG testing email
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> Inbox > MAM Nevyžiadaná pošta [1]	Finance FW: MultiSport - opatrenia k m 13.10.2020 From:	Drag&Drop of the whole email  Recipients:  + -  Drag&Drop of the whole email  emily.bronte@tech-arrow.com
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> Search Folders > Groups	oG testing 07.10.2020 oG testing email <end></end>	Recipients only     My organization
vemily.bronte@tech-arrow	CAEA basic test protocol 01.10.2020 Hello, I am sending the testing	O Public     Contione     Share     Cancel
Image: Non-state         A         B         ···           Items: 7 369         Unread: 251         ▲ Reminders: 1	Finance	All folders are up to date. Connected to: Microsoft Exchange



Screenshot: Drag&Drop of the whole email and just the attachment

Fill in the rest of the sharing options based on the section above.

#### Sharing from contentACCESS archive

When sharing from contentACCESS archive, only the document reference is shared, the document content is not duplicated/copied.

First, **log in** to the contentACCESS provider. Navigate to the desired archive entity, where you would like to share item(s) from. Select **Share** from its context menu.



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In case of sharing from Email archive, choose if you want to share the **whole email**, or just the **selected attachment(s)**.



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	erik.larson@tech-arrow.com		
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Fill in the rest of the sharing options based on the section above.

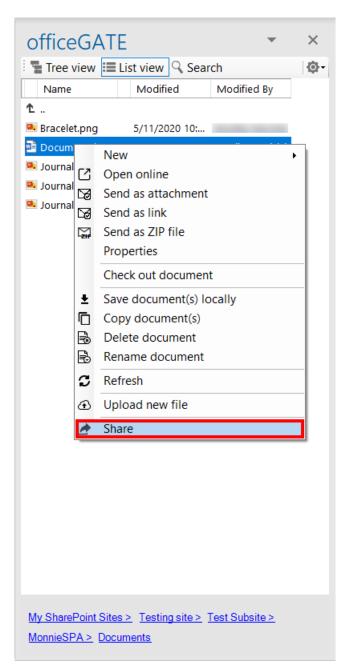
### Sharing from other providers - My Computer, OneDrive, My SharePoint Sites

When sharing from these providers, the document is first copied into contentACCESS.



*Important:* If SharePoint proxy is configured in the <u>Central Administration</u>, only the document reference of the SharePoint and/or OneDrive item is shared, the item content is not duplicated/copied.

Navigate to the desired entity and in the **List view**, select **Share** from the context menu of the item that you would like to share.



Screenshot: Sharing from My SharePoint Sites



Fill in the rest of the sharing options based on the section above.

#### Creating an email with Sharing

It is possible to Share items directly when writing a new email. You can choose one of the following:

 Click on the Share button in the toolbar and then browse local files after clicking on the +Add button in the section Files to share, or Drag&Drop files to the field.

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	Subject	Testing	⊕ ▲ OneDrive
Sending the	<u>testing</u> email <u>w</u>	ith shacing links	
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2. In the officeGATE pane, select the item(s) that you would like to share and then pick the **Share** option from the context menu.



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File Message Inser	t Options Format Text Revi	iew Help										
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То	<ul> <li>Emily Bronte;</li> </ul>								officeG	ATE		
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Send Cc									File name		Folder	Creati
Bcc									10 thing yo	u s 766 KB	Londor	n_testd 4/13/2
Subject Iello, 'm sharing the following it	Sharing ems with you:								■ 2319px-1 ■ 315px-L( ■ 330px-3) ■ 360px-V ■ 375px-B; ■ 375px-K	Open     Open conte     Open conte     Send as attle     Send as attle     Properties     Save docum     Copy docun     Create folde     Refresh     Upload new     Enable offlii	achment file nent(s) local nent(s) er	

London\_testd... 4/11/2 London\_testd... 4/11/2 London\_testd... 4/11/2 London\_testd... 4/11/2

London\_testd... 4/11/2

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E London Bus.jpg 23.4 KB London touris... 422 KB

London\_Bus\_r... 23.4 KB London-touris... 42.2 KB

contentACCESS > File system archive (EA\_Test) > [TECHNB0024] C. ≥ Basic things > Testdata > London\_testdata (30 items)

<



In both cases, the email addresses of the email recipients are automatically synchronized into the **Recipients** field of the sharing.

🖫 ୨ ୦ ↑ ↓ 🔻	Testing - Message (HTML)	. <b>6</b> .		- 🗆 ×
File Message Insert Options Format Text Review Help A	crobat 🛛 🖓 Tell me what you want	to do		
Paste Basic Text Vicce Sensitivi	panel Archive	Upload to contentACCESS	Manage Archive	hts View Templates My Templates
From V @tech-arrow.com			officeGATE	Search
Send To <u>Emily Bronte</u> ; <u>Elena Ferrante <elena.ferrante@tech-a< u=""></elena.ferrante@tech-a<></u>	rrow.com>;		Share with contentAC	CESS
Сс			✓ Files to share	^
Subject Testing			+ Add	d – Remove
Sending the testing email with sharing links			<ul> <li>■ 20200809_152400.jpg</li> <li>■ shutterstock_1833259603,</li> <li>■ Wools.png</li> </ul>	jpg
			✓ Share with	
			Recipients:	~ + -
			emily.bronte@tec elena.ferrante@te	
			Recipients only	~
4			Share	e 👻 Cancel

Fill in the rest of the sharing options based on the section above and then click on **Share via Outlook**. The links pointing to the shared items are then inserted into the body of the email, which you can now send.



<b>□ り</b> ひ↑↓ ▼		Testi	ing - Message	e (HTML)	a 6 a		T	- 🖸	×
File Message Insert Paste Clipboard Is			Contraction of the second seco	II me what you wan Manage Archive contentACCESS Archive	Upload to contentACCESS	Manage Archive contentACCESS Email Archive	Insights	View Templates My Templates	~
Send From V Cc	©tech-arrow.com ○ Emily Bronte; ○ Elena Ferrante <4	elena.ferrante@tech-arrow.co	<u>)m&gt;;</u>					SS row.com	×
Subject	Testing ith sharing links					Recipients only     My organization     Public     Options			
						Expires in Limit download cou	nt to 5	.03.2021 [	
[4]							Share	via Outlook and send emai and get link I  Cance	

#### Modifying sharing settings and checking sharing status

*Important*: This section is applicable only for the sharing that works with **contentACCESS version newer than 4.2**.

If an item has been shared before, it will be marked in its **Properties** (preview).



officeGATE	-	×
Tree view 📃 List view 🤍 Search		<b>@</b> -
Sharing Item is shared 2 times.	Show more	Î
Participants		-
Noreply@tech-arrow, Emily		
	Show more	2
Subject EATest-Admin has shared items with you		
Date 2/5/2021 5:08:46 PM		
Unread True		
Dear emily.bronte@tech-arrow.co	om,	
EATest-Admin has shared items with you. You can access them until 2/7/2021 and d them 3 time(s).	lownload	
Message from EATest-Admin: SKE + EBR 2	2x3	
You can access them using the following l shared files	ink: <u>Acce</u> s	<u>5:</u>
Sincerely, your contentACCESS Team		~
Open 🗸 🗸	Close	•

First, you will need to click on **Show more**. You will be then able to see the sharings of the item and use the **Modify** and **Status** options.



officeGATE	-	×
📲 Tree view 🗮 List view 🔍 Search		<u>ب</u>
Sharing		^
Shared on Shared with Status		
16/02/2021 Recipients only Active Status Modif		
17/02/2021 Recipients only Active Status Modif	¥.	
<u>S</u>	how les	s
Participants		
Noreply@tech-arrow, Emily		
<u>Sh</u>	ow mor	e
Subject		
EATest-Admin has shared items with you		
Date		
2/5/2021 5:08:46 PM		
Unread		
True		
Dear emily.bronte@tech-arrow.com	ı,	
EATest-Admin has shared items with you. You can access them until 2/7/2021 and dow them 3 time(s).	nload	
Message from EATest-Admin: SKE + EBR 2x3		
You can access them using the following link	: <u>Acce</u>	<u>s</u> ~
Open 🔽	Close	2

When you click on the **Modify** option, the **Sharing** pop-up window will open. Here, you will be able to add and/or remove recipients, change accessibility, the expiration date and download limit. The option **Save and get link** works the same as **Share and get link**, the option **Save and send email** works the same as **Share and send email**. The option **Save** just saves the changes that were made to the sharing settings.



Sharing	X
Share with	
Recipients:	~ + -
monika.nevio	:ka@gmail.com
Recipients only	
O My organization	
O Public	
Options	
Expires in	3 🖨 days
	21.02.2021
Limit download count	to 3 🛉 per recipient
Remember these setting	ngs
	Save 💌 Cancel
	Save
	Save and get link
	Save and send email

When you click on the **Status** option, you will be redirected to the window where you will be able to view the **status** and **information** about the selected sharing and the **download history**. From here, it is also possible to **Activate** or **Suspend** the sharing. The top button (1) activates or suspends the **whole sharing**, the bottom button (2) activates or suspends the **sharing of the selected item**, in case more items were shared together.

If necessary, it is also possible to re-send the sharing notification by clicking on the **Send sharing notification** button.



Sharing			×
Sharing stat	us		
Status:	Active	<b>1)</b> <u>Su</u>	<u>spend</u>
Shared by:	EATest-Admin		
Shared on:	16/02/2021 15:31:52		
Expires on:	19/02/2021 23:59:59		
Download limit	: 3 per recipient		
Shared with:	Recipients only		
Shared files			
Filename		Status	Down
EATest-Admin	has shared items with you.msg	Active	0/3
EATest-Admin	modified permissions of already shared items.msg	Active	0/3
EATest-Admin	has shared items with you.msg	Active	0/3
<			>
		<mark>2)</mark> <u>Su</u>	spend
Download h	istory of EATest-Admin has shared item	s with	yo
Email address	User name Downloaded on IP address Device		
	The file was not downloaded yet.		
Send sharing	notification	Clo	se

## 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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FILE	MESSAGE	INSERT O	PTIONS	FORMAT TEXT	REVIEW	DEVELOPER						· · · ·		
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	From -	monika.nevicka@	@tech-arrow.	.com							GATE			× ×
=	то									_		view 🤍 Searc		( @-
Send	Cc									Name			<ul> <li>Extension</li> </ul>	Last
										📕 Outloo	k forms			10/9
	Subject	-								Prereq Remot				10/9
	Attached	TECH-ARRO	W template.	.docx (76 KB)						Kemot XML	e FA			12/2 9/7/:
										conten	tACCESS Man	ual_v 3.4.docx	docx	1/29
1											nFormFix.ps1		ps1	10/1
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				attacin	ine uocui							ate - Copy.docx	docx	11/1
											ARROW_templ		docx	11/7
										<				>
										<u>OneDrive</u>	> Personal >	cA manuals (10 i	items)	

# 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). In case of uploading to the **Sharing** in **contentACCESS**, it is possible to upload only to the **My Shares** folder of the user you are logged in with, in our case it is EATest-Admin.



All Unread By Attachments → ↑ Mailapp and ShareApp login i Hello Everyone, We found out, Finance FW: MultiSport - opatrenia k m 13.10.2020 From:	CAEA basic test protocol To ● Cc	Email archive (EA_Test)     Email archive (EA_Test)     Ene System archive (EA_Test)     GDPR Application (EA_Test)     GDPR Exchange (EA_Test)
Finance PW: Aplikácia MultiSport do s 08.10.2020 From:	mycompanyarchive + Get more add-ins Hello,	Gram SharePoint archive (EA_Test)     Gram SharePoint archive (EA_Test)     Gram SharePoint proxy (EA_Test)     Gram Sharing (EA_Test)
oG testing 07.10.2020 oG testing email <end></end>	I am sending the testing protocol for contentACCESS EarlyAccess basic Test. Upload the attachmen You can also find it on the SharePoint page: https://techarrow.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=%7B01767B10-2C32-4523-	t ⊕- → Administrator ⊕- ↓ EATest-Admin
CAEA basic test protocol 01.10.2020 Hello, I am sending the testing	Best Regards,	□ My shares □ Shared with me □ □ □
Finance FW: S kartou MultiSport na RE 11.09.2020 From:	Address Ucitafska 15: 821 06 Bratislava Slovaka. EU or whole email message	
Finance FW: Jesenné špeciality MultiSp 03.09.2020 From:	Email Sulvadu, @ltech-arrow.com Web www.tech-arrow.com Follow us f in the State for the second secon	
Finance FW: MultiSport - NOVINKY TO 27.07.2020 From:		₩- <u>+</u> #-1
Q V	All folders are up to date. Connected to: Micro	

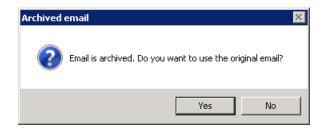
# Manual email archiving using contentACCES

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.



All Unread By Attac Mailapp and ShareApp login i Hello Everyone, We found out Finance FW: MultiSport - opatrenia k m From:	chments ✓ ↑ 0 13.10.2020 13.10.2020	CAEA basic test protocol	←     ≪     →        01.10.2020	officeGATE     ✓     ×       Tree view     Ist view     Search     ✓       Favorites     ✓     contentACCESS       Email archive (EA_Test)     Image: Search arrow.com       Image: Search arrow.com     Image: Search arrow.com       Image: Search arrow.com     Image: Search arrow.com       Image: Search arrow.com     Image: Search arrow.com
Finance FW: Aplikácia MultiSport do s From:	08.10.2020	mycompanyarchive Hello,		Calendar Deleted Items Drafts
oG testing oG testing email <end></end>	07.10.2020	I am sending the testing protocol for contentACCESS EarlyAccess basic test You can also find it on the SharePoint page: https://techarrow.sharepoint.com/:x:/r/_layouts/15/Doc.aspx?sourcedoc=?		Periodical search     Sent Items     Sharing     erikJarson@tech-arrow.com
CAEA basic test protocol Hello, I am sending the testing	01.10.2020	Best Regards,	Drag&Drop	
Finance FW: S kartou MultiSport na RE From:	0 11.09.2020	Address Učiteľská 15; 821 06 Bratislava Slovakia, EU		GDPR File system (EA_Test)     GDRA File system (EA_Test)     SharePoint proxy (EA_Test)     SharePoint proxy (EA_Test)     GTA sharing (EA_Test)
Finance FW: Jesenné špeciality MultiSp From:	03.09.2020	Email <u>@dech-arow.com</u> Web <u>www.tech-arow.com</u> Follow us fin S S C		Teams archive (EA_Test)     Teams chat archive (EA_Test)     My Computer     My SharePoint Sites
Finance FW: MultiSport - NOVINKY TO From:	27.07.2020	4	Þ	ConeDrive

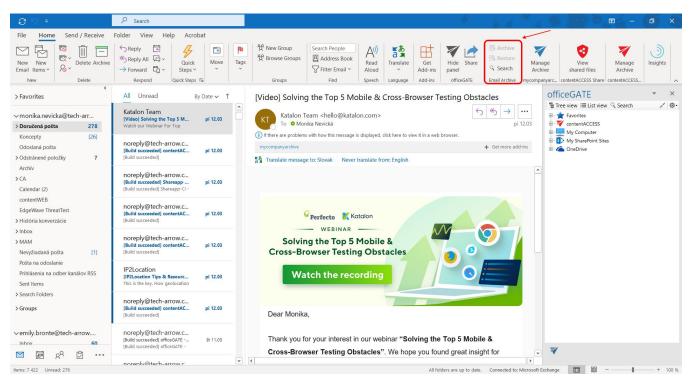
If the email has been already archived and the user drops this message to officeGATE, the application will warn him about that. The user will be asked, if he wants to archive the original email instead.



# Handling emails - archive, restore, search

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





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

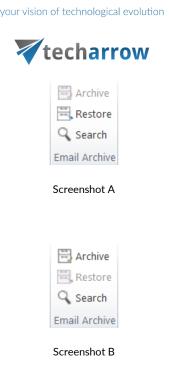
- officeGATE must be connected with contentACCESS
- Email archive must be configured for the selected mailbox
- Email archive job must be run at least once before for the mailbox
- The signed in user must have the following permissions allowed in his <u>role</u> in contentACCESS

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Select a tenant, where the role will be available         Tenant:       TECH-ARROW         Role display name:       Full_EAUser         Enable ribbon filter:	e details							×
Role display name:       Full_EAUser         Enable ribbon filter:	ect a tenant, where the role	ill be available						
Enable ribbon filte:         Plugin.Datengut         View Datengut DDCs: <ul> <li>Not allowed</li> <li>All allowed</li> <li>Specific allowed</li> <li>Yiew all public folders:</li> <li>Not allowed</li> <li>All allowed</li> <li>Specific allowed</li> <li>Yiew EPO SAP:</li> <li>Not allowed</li> <li>All allowed</li> <li>All allowed</li> <li>All allowed</li> <li>All allowed</li> <li>All allowed</li> <li>Specific allowed<td>ant:</td><td>TECH-ARROW</td><td></td><td>Ŧ</td><td></td><td></td><td></td><td></td></li></ul>	ant:	TECH-ARROW		Ŧ				
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View Datengut DDCs: <ul> <li>Not allowed</li> <li>All allowed</li> <li>Specific allowed</li> <li>Specific allowed</li> <li>Specific allowed</li> <li>Specific allowed</li> <li>All allowed</li> <li>Specific allowed</li> <li>Yiew all public folders:</li> <li>Not allowed</li> <li>All allowed</li> <li>Specific allowed</li> <li>Yiew EPO SAP:</li> <li>Not allowed</li> <li>All allowed</li></ul>	ble ribbon filter:							
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Export:       Not allowed       I allowed       Specific allowed       ?         Manual archive:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Preview:       Not allowed       All allowed       Specific allowed       ?         View all public folders:       Not allowed       All allowed       Specific allowed       ?         Plugin.EPO       ///////       Not allowed       All allowed       ?       ?	in.EmailArchive							_
Manual archive:       Not allowed       All allowed       Specific allowed       ?         Manual recovery:       Not allowed       All allowed       Specific allowed       ?         Manual restore:       Not allowed       All allowed       Specific allowed       ?         Preview:       Not allowed       All allowed       Specific allowed       ?         View all public folders:       Not allowed       All allowed       Specific allowed       ?         Plugin.EPO       View EPO SAP:       Not allowed       All allowed       ?       ?	v mailboxes:		Not allowed	<ul> <li>All allowed</li> </ul>	O Specifi	c allowed	?	
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Manual restore:       Not allowed       Image: All allowed       Specific allowed       ?         Preview:       Not allowed       All allowed       Specific allowed       ?         View all public folders:       Not allowed       All allowed       Specific allowed       ?         Plugin.EPO       View EPO SAP:       Not allowed       All allowed       ?       ?	nual archive:		Not allowed	<ul> <li>All allowed</li> </ul>	O Specifie	c allowed	?	
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View all public folders:       Not allowed       All allowed       Specific allowed       ?         Plugin.EPO       View EPO SAP:       Image: Not allowed       All allowed       ?	nual restore:		Not allowed	<ul> <li>All allowed</li> </ul>	O Specifie	c allowed	?	
Plugin.EPO       View EPO SAP:       O Not allowed       All allowed	view:		Not allowed	<ul> <li>All allowed</li> </ul>	O Specifie	c allowed	?	
View EPO SAP: <ul> <li>Not allowed</li> <li>All allowed</li> </ul>	v all public folders:		Not allowed	<ul> <li>All allowed</li> </ul>	O Specifie	c allowed	?	
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Save Cance	v EPO SAP:		<ul> <li>Not allowed</li> </ul>	All allowed			?	•
Save Cance						Cauta	6	
						Save	Cance	

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, 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 origi	nal email 🛛 💠 Restore original email
†	Email has no attachments	
ኛ 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.

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¥			Search the a	rchive			_ 🗆 X
Search in	All mailboxes					~	•
Keyword	7						₽ Search
0 document	(s) found in "dne@ta.internal".						
From	Subject	Date -	То	Folder	Mailbox		
L							

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.

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abla Search the archi	ve						_		×
Search in	Current mailbox						~		
Keyword 🛛 🏹								₽ Sear	ch
Results	Subject File name Folder								
From	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.

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*			Search the ar	chive		_ 🗆 X
Search in	All mailboxes					<b>~</b>
Keyword	Subject:(text)					₽ Search
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

Normal
Low
High

Screenshot : Importance options

Normal	
Normai	
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	
Search in All mailboxe Keyword 🔽 Subj 6 document(s) found in "	ect:(outlook)					~ 	۵ Sea	rch	]
From	Subject	Date	То	Folder	Mailbox				
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<dne< td=""><td>FW: Outlook forms testin</td><td>11/3/2017 3:19</td><td>Danise Nanit.</td><td>Inbox\Em</td><td>dne@ta.inter</td><td></td><td></td><td></td><td></td></dne<>	FW: Outlook forms testin	11/3/2017 3:19	Danise Nanit.	Inbox\Em	dne@ta.inter				
<dne< td=""><td>RE: Outlook forms testin</td><td>11/3/2017 3:18</td><td>Denice Renic.</td><td>Inbox\Em</td><td>dne@ta.inter</td><td></td><td></td><td></td><td></td></dne<>	RE: Outlook forms testin	11/3/2017 3:18	Denice Renic.	Inbox\Em	dne@ta.inter				
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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 resil.	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 the archiv	e	_		<
Search in	All mailboxes	$\sim$		
Keyword V	test	$\sim$	₽ Search	]

434 document(s) found in all mailboxes.

	From	Subject			Date	-	То		Folder	Mailbox	1
	Erika Bugár <erika.bugar@t< td=""><td>teamsTALK- meeting butte</td><td>on te</td><td>st</td><td>5/4/2022 10:2</td><td>0:2</td><td>Erno</td><td>Rubik &lt; Erno</td><td>Deleted Items</td><td>emily.bronte@tec</td><td></td></erika.bugar@t<>	teamsTALK- meeting butte	on te	st	5/4/2022 10:2	0:2	Erno	Rubik < Erno	Deleted Items	emily.bronte@tec	
U	emily.bronte@tech-arrow.co	EA zip			4/14/2022 11:	25:	elena	a.ferrante@te	Migration\In	emily.bronte@tec	
U	emily.bronte@tech-arrow.co	EA attachments			4/14/2022 11:	24:	elena	a.ferrante@te	Migration\In	emily.bronte@tec	
U	emily.bronte@tech-arrow.co	Mail app test - for attachr	nents		4/13/2022 3:2	9:5	elena	a.ferrante@te	Sent Items	emily.bronte@tec	l
	"noreply@tech-arrow.com"	Periodical search result	ß	Open				/ Bronte <e< td=""><td>Inbox</td><td>emily.bronte@tec</td><td></td></e<>	Inbox	emily.bronte@tec	
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	"noreply@tech-arrow.com"	Periodical search result			3/28/2022 12:	50:	Emily	/ Bronte <e< td=""><td>Inbox</td><td>emily.bronte@tec</td><td></td></e<>	Inbox	emily.bronte@tec	
	"Erika Bugár in Teams" <nor< td=""><td> Erika - URGENT</td><td></td><td></td><td>3/28/2022 10:</td><td>36:</td><td>emily</td><td>bronte@tec</td><td>Inbox</td><td>emily.bronte@tec</td><td></td></nor<>	Erika - URGENT			3/28/2022 10:	36:	emily	bronte@tec	Inbox	emily.bronte@tec	
	"You have new messages in	MarieCurie and Erika sent	2 me	ssages	3/28/2022 9:0	9:5	emily	bronte@tec	Inbox	emily.bronte@tec	

# SharePoint data handling

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, folders and document sets.

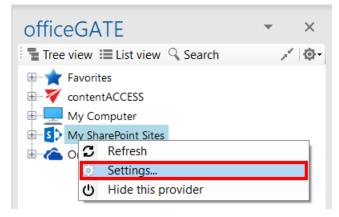
officeGATE enables for the user to use SharePoint's content type selection and metadata fill directly from Outlook by uploading a document. This feature allows to categorize your documents better and helps to save important information about a file or list item for future use. Different content types 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 c	onnector settings						-		×
Global user									
0	Specify user which v	vill be used to access	s one or more sites.						
X	User name:	monika.nevicka@te	ch-arrow.com						
	Password:	****							
	Confirm password:	****							
Sites									
	Url		Login		Enabled				
S 🔉	https://techarrow.sł	harepoint.com/site	monika.nevicka@t	ech-arrow.com					
	https://eimdemo1.s	harepoint.com/sit	admin@eimdemo	1.onmicrosoft.com	$\checkmark$				
	https://techarrow.sh	harepoint.com/site	global: monika.nev	vicka@tech-arrow.c	$\checkmark$				
	Add new site	e	Edit site	Delete site					
Content types									
(	Show the conten	t type selection dialo	og only if required fi	elds are present					
						Sav		Canad	1
						Sav	e	Cance	21

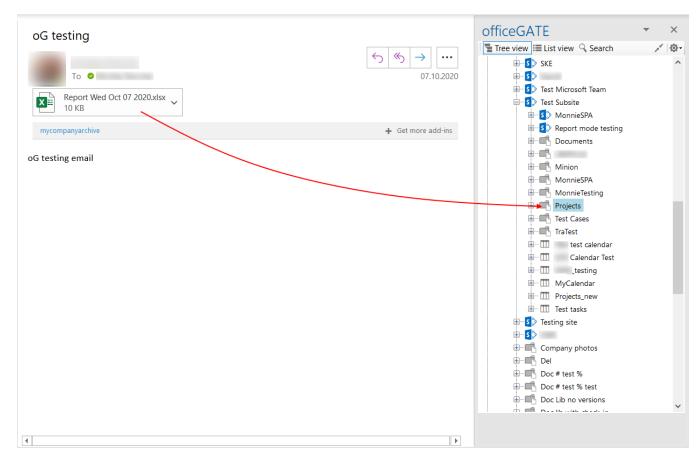
Check/uncheck the **Show the content type selection dialog only if required fields are present** checkbox depending on how you would like to use this feature. On the screenshot above we have configured, that we would like to specify these data only if there are required fields present.

## 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.







officeGATE	-	×
📲 Tree view 📰 List view 🔍 Search		×lø
Report Wed Oct 07 2020.xlsx in Projects		
Content type		
Manual		-
Manual		
Document		
Installation protocol		
Release notes		
Report Excel file		
Product		+
contentACCESS		•
Version number *		
1		
	CI-	
Save	Clo	se

On the illustrative screenshot above there are 4 content types available for the user: **Manual, Document, Installation protocol** and **Release notes**. The user may select one of these content types. In our case, we chose **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: **Name, Title, 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 **Save** to upload your file into the stated library.

Important: Do not forget to Check in the item after uploading it.

officeGATE • ×
Tree view 🗮 List view 🔍 Search 💉 🔅
contentACCESS 3.8 release notes.pdf in Projects
Content type
Release notes 🔹
Name *
contentACCESS 3.8 release notes
Title *
contentACCESS 3.8 release notes
Product * +
contentACCESS -
Version number *
3.8
Release date
Wednesday, November 6, 2019
Save Close
*

#### Since version 3.3, officeGATE is able to handle the following in My SharePoint Sites:



- Sites/Subsites 🚺
- Document libraries 🛋
- Document sets 📗
- Folders 🗐
- Lists 🎹

#### **Document library**

- contains items with and without metadata

#### **Document set**

- acting like a common folder, but with metadata
- files can be uploaded to it

#### List

- contains only documents consisting of metadata, attachments can be added to these documents

The table below lists all available operations in the context menu of a SharePoint item. Locate your desired item 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 item type. The table below gives a general overview about the available options:

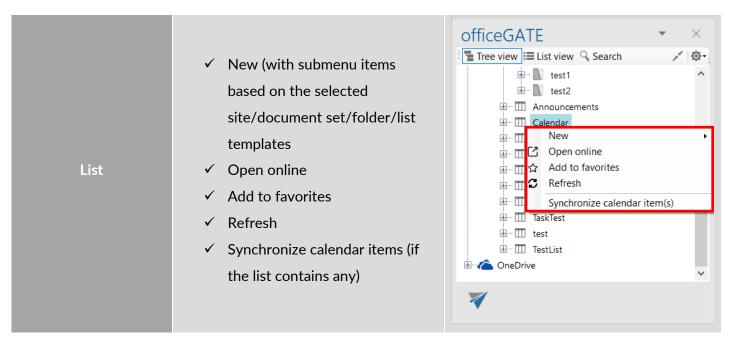
*Note:* The **New** menu with submenu items is only available for SharePoint online. If you are using onpremise SharePoint, you will have the options **"New item"** and **"New folder"** instead, like in <u>officeGATE</u> <u>version 3.9</u>).

SharePoint item	Context menu options	Screenshot
-----------------	----------------------	------------

# **Techarrow**

	✓ New (with submenu items	
	based on the selected	officeGATE • ×
	site/document set/folder/list	Tree view 🔚 List view 🔍 Search 💉 🔅
	templates	
<b>-</b>	✓ Open online	ternes S vwe
Document library	$\checkmark$ Add to favorites	Company photos
	✓ Upload new file	Open online
	✓ Refresh	
	✓ Enable offline access	B Refresh
	✓ Enable offline access (recursive)	
Document set	<ul> <li>✓ New (with submenu items based on the selected site/document set/folder/list templates</li> <li>✓ Open online</li> <li>✓ Rename folder</li> <li>✓ Delete folder</li> <li>✓ Add to favorites</li> <li>✓ Properties</li> <li>✓ Upload new file</li> <li>✓ Refresh</li> <li>✓ Enable offline access</li> <li>✓ Enable offline access (recursive)</li> </ul>	Image: Search       Image: Search         Image: Search





## **Creating new SharePoint item**

Depending on list type the user clicked on, one of the following items will be displayed in context menu:

## Upload new file

The file selection dialog will open, followed by document metadata dialog (if they are required).

#### New

A submenu with the list of all available templates for the selected entity will open.

	Folder		New +
<b>1</b>	Word document Excel workbook	[2] ☆	Open online Add to favorites
	PowerPoint presentation OneNote notebook	Ð	Upload new file
8	Forms for Excel	C	Refresh
	Visio drawing		

If you chose Folder, a pop-up window where you must name the folder will appear. Name it and click OK.

te	charrow	
Vreate new folder	_	>
Enter the name of the new folder		
New item folder		

If you chose one of the available templates (Word document, Excel workbook, etc.) and some required values (metadata) are missing, you will get this warning:

Missing required values			×
There are required fields which n edit these values first or you war			
Ec	lit required fields	Open document	

If you choose **Open document**, officeGATE opens the document online and you can start directly editing it. After you are finished with the changes and close the document tab/window, you will need to fill in the required fields back in officeGATE.

If you choose **Edit required fields**, the item details window will open (same as when you select **Properties** from the item's context menu). Here, you will need to fill in the required values (marked with red asterisk). Then you can **Open** and edit the document online.



officeGATE • ×
Tree view 📃 List view 🔍 Search
Document3.docx in MonnieSPA
Content type
Document -
Name *
Microsoft conference.docx
Title *
Microsoft conference
Created: 5/18/2020 3:46:27 PM
Modified: 5/18/2020 3:46:27 PM
You checked out this item, so others cannot edit it.
Discard check out Close
Open Save and check in 🔽

The document is then created in SharePoint.

*Important:* Do not forget that the document is automatically **checked out** after being uploaded to SharePoint.



Another way of item creation is by Drag&Drop. If the user drops an Outlook item or a file into a list that supports attachments, one of these two behaviors will occur:

1. If the user drops the item to empty space of the list, the item creation dialog will open, with the item being pre-filled in the attachment list.

🖓 Reply 🖓 Reply All 🎧 Forward 😤 IM		officeGA		<b>C</b> 1	▼ X
Mon 03-Jun-19 04:47 PM		Completed	E List view ♀ Title	Due Date	Assigned
tech-arrow@tech-arrow.com		î.			
contentACCESS 3.8 Release Candidate is out		No No		7/28/2018	
To techarrow_all	~	No		7/28/2018	
Message 🔄 contentACCESS 3.8 release notes.pdf (208 KB)		No No	MonnieTest	7/28/2018 10/19/2019	
mycompanyarchive + Get more app	is is	No	MNEtesting	10/19/2019	Monika Ne
injednipalijarenive . Get nore up		No No	MNEtest2	10/19/2019	
Dear partner,	<b>^</b>	No No	MNE3test	10/19/2019	Monika Ne
		🗏 No	MNE4	10/19/2019	Monika Ne
As part of our commitment to bring our customers a fast, secure and handy platform for archiving and productivity solutions, I'm excited to announce that we have reached the <b>Release Candidate</b> milestone for <b>contentACCESS 3.8</b> . Compared to BETA, in this version we have solved a lot of issues to bring our customers better performance and a more stable and usable product. For more information about the new features and improvements in contentACCESS 3.8, please read the attached release notes. While updating to contentACCESS 3.8 from earlier versions (3.7 and older), please note, there are some <b>important changes</b> :					
<ul> <li>Outlook forms must be republished due to authentication changes.</li> <li>The minimum required SQL version was increased from MS SQL 2008 to MS SQL 2012.</li> </ul>					
Your feedback and help are valuable and will be highly appreciated. If you have any questions or find any issues, please let me know!					
Please note, that it is not recommended to install the Release Candidate version of the software on a production system.					
Best regards,					
and have being the second					
🛛 techarrow		<			>
Address Kazanská 5b; 82106 Bratislava	-	My SharePoint S	ites >		
		https://techarrow	.sharepoint.com/	sites/testing >	
		<u>NewTasks (8 ite</u>	<u>ms)</u>		

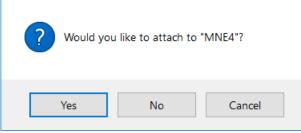


officeGATE			<del>-</del> ×
Tree view 📃 List view	v 🔍 Search		
New Task			
in NewTasks			
Assigned To			^
% Complete			
0			
Description			
			ł.
Predecessors		+	
(None)		•	
Priority		+	
(2) Normal		•	
Task Status		+	
Not Started		•	
Related Items			
Attachments		+ -	
ContentACCESS 3.8 re	lease notes.p		
			~
	Save	Close	

2. If the user drops the item to an existing item, a question whether he wants to create a new item using the dropped item or to attach the item to the existing item (drop target) will appear.

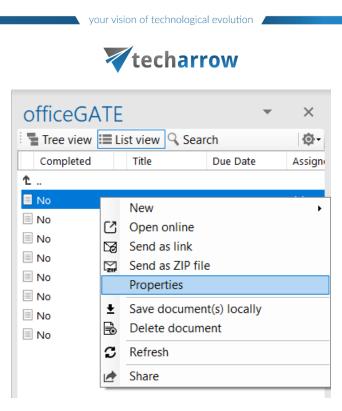


			1			- x
🚘 Reply 🛱 Reply All 🕞 Forward 🛭 🐔 IM			officeGA			
Mon 03-Jun-19 04:47 PM			Tree view			@-
tech-arrow@tech-arro	w.com		Completed	Title	Due Date	Assigned
contentACCESS 3.8 Release Can	ididate is out		No		7/28/2018	
To techarrow_all		~	No		7/28/2018	
			No		7/28/2018	
Message 🛃 contentACCESS 3.8 release notes.pdf (208	( KB)		No	MonnieTest	10/19/2019	
mycompanyarchive	+ Get	more apps	No	MNEtesting MNEtest2	10/19/2019	Monika Ne
Description			No	MNE3test	10/19/2019 10/19/2019	Monika Ne
Dear partner,			No	MNE4	10/19/2019	Monika No
excited to announce that we have reached the <b>Re</b> version we have solved a lot of issues to bring our more information about the new features and imp While updating to contentACCESS 3.8 from earlier - Outlook forms must be republished due to - The minimum required SQL version was in Your feedback and help are valuable and will be hi know!	s a fast, secure and handy platform for archiving and productivity solution lease Candidate milestone for contentACCESS 3.8. Compared to BETA, i customers better performance and a more stable and usable product. Fo provements in contentACCESS 3.8, please read the attached release note: versions (3.7 and older), please note, there are some important change o authentication changes. creased from MS SQL 2008 to MS SQL 2012. ghly appreciated. If you have any questions or find any issues, please let i I the Release Candidate version of the software on a production system	nthis r :	<			>
Augusta 50, 02100 Dialisa va		Ľ	https://techarrow		sites/testing >	
			NewTasks (8 ite			
	My SharePoint Sites	×				



#### **Opening and updating an item**

The main content of a **document library item** is the file – double-clicking on it will download and open it in the suitable application. If the user wants to view and/or modify its properties, it is possible by selecting **Properties** from the item's context menu: it will open the item properties dialog mentioned above (without attachment list), where the user can view and/or modify the document's metadata.



On list items, double-click will open the dialog mentioned above (now with the attachment list displayed). The user will be able to view and modify the item's metadata and the attachment list. The **Properties** context menu option is also available on list items, having the same function as double-click.

## Viewing and editing metadata

Document metadata are displayed in the list view in officeGATE pane. To view/edit metadata and add/open attachments, the above mentioned edit dialog must be opened either by double-clicking on a list item or by selecting **Properties** from the item's context menu.



ONCEGATE	×
Tree view 🗮 List view 🔍 Search	<del>0</del> -
(no title) in NewTasks	
Content type	^
Task 🔹	
Title *	
Testing task	
Start Date	
✓ Saturday , July 27, 2019	
Due Date	
✓ Sunday , July 28, 2019	
Assigned To	
Monika Nevická	
% Complete	
0	
Description	
Predecessors +	
(None)	
Priority +	
(2) Nemel	~
Created: 7/6/2018 2:03:37 PM	
Modified: 7/6/2018 2:03:43 PM	
Save Close	

#### Picking a user or a group from a SharePoint site

For some fields (like **Assigned To** on out screenshot), it is required to pick the user or group from the SharePoint site the item belongs to. To do this, click on the three dots:



officeGATE	~ >
📲 Tree view 🗮 List view 🔍 Search	Ô
MonnieTest in NewTasks	
Content type	^
Task	•
Title *	
MonnieTest	
Start Date	
✓ Tuesday , October 15, 2019	
Due Date	
Saturday , October 19, 2019	
Assigned To	
% Complete	
0	
Description	
Predecessors	+
	•
Priority	+
/NI>	- ~
Created: 10/14/2019 2:34:52 PM Monika	
Modified: 10/14/2019 4:01:48 PM Monika	a Nevická
Save	Close

The user/group selection window will open. Enter the name of the user or group you want to search for (1) and click on the **Search** button. Click on the desired user/group and add it by clicking on **Select** (2). If you want to remove a user/group, click on it in the lower field and click on **Remove**. To add more users and/or groups, repeat the steps above. When you are finished with selecting, click on **OK** (3).



Search for user or group					
ዯ	Select a user or a group from th	nis Sha	rePoint site.		
Search for: <b>1)</b>	Test				Search
	Name edgewave_test Microsoft Test test archive test mbx03 TestGroup	Title	Department	Email edgewave_test@tech-arrow.com mstest@tech-arrow.com testarchive@tech-arrow.com	2)
	Testing Man Testing site Members Testing site Owners Testing site Visitors Testing team demo Members Testing team demo Owners Testing team demo Visitors			testingman@tech-arrow.com	~
Select Remove	Microsoft Test			3) ок	Cancel

# **Offline synchronization**

*Note:* Offline synchronization is currently disabled for the SharePoint provider.

# Check-out/check-in and versioning in a library

*Note:* Check out feature is enabled on all SharePoint sites. If you want your users to be able to edit **only documents that they checked out**, you need to enable the **"Force check out"** feature.



**Check out** option allows the user to block a document while doing changes on it. When the changes are done, the blocking can be removed by selecting the **Check in** option, which also applies the changes that were made. If the user doesn't want to save the changes that were made, he can choose to **Discard check out**. While a document is checked out, no other users can make changes on it, except the user that the document is checked out to.

To check out a document, select the Check out document option from its context menu.

officeGA	TE		•	×	
Tree view	🗏 List view 🔍 Sea	arch		<del>ن</del> ې-	
Name	Picture Size	File Size		Modifi	
<ul> <li>▲</li> <li>➡ PicSubFolder</li> <li>➡ PicSubFolder2</li> </ul>	2			8/15/20 8/15/20	
📧 ~ACL.jpg	960	200 KB		6/10/20	
🔍 55337 with EL	1289	82,6 KB		6/10/20	
Application Set EmailArce EmailArce EmailCele EmailRece EmailRece EmailRece EmailRece Retrieve Retrieve, Retrieve, Retrieve, Saperion Saperion Screen SI C C C	New Open online Send as attachme Send as link Send as ZIP file Properties Check out docum Save document(s Copy document(s Delete document Rename document Refresh Upload new file Share	ent ) locally ;)		6/10/20 /20 /20 /20 /20 /20 /20 /20 /20	
My SharePoint Sites > Testing site > Test Subsite > LBAPicLib					

When a document is **checked out**, it is marked the following way:



- 😢 = checked out by the current user (you)
- 🕲 = checked out by a different user

Details about the **check out** can be viewed by selecting **Properties** from the item's context menu.

Tree view List view Search   Document.docx MonnieSPA.txt   Document Name*   Document.docx Name*   Document.docx MonnieSPA.txt   Title * MonnieSPA.txt   Title * Title *   Created: 4/24/2020 11:13:11 AM Modified: 4/24/2020 11:13:13 AM You checked out this item, so others cannot edit it. Save and check in  * Close Discard check out	officeGATE • ×	officeGATE 🔹 👻
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Screenshot: Item checked out by the current user (left) and item checked out by different user (right)



The next step is to edit the document. This can be done by selecting **Open online** from its context menu and editing it online. After the desired changes are made, you can close the browser.

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If you want to apply the changes that were made, click on the **Check in document** option. This will also make the document available for other users and create a new version of the document. Older versions and version history can be viewed directly SharePoint, officeGATE always opens **the latest version**.

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After selecting the **Check in document** option, a pop-up window with the possibility to add a comment will appear. It is recommended to always write down some notes in order to have a better overview later. Click **OK**.

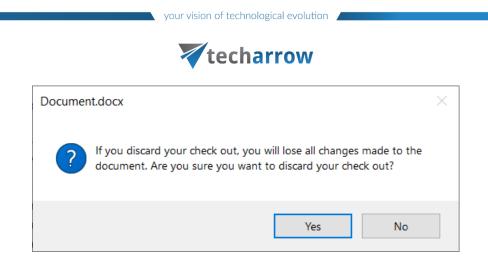
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If you don't want to keep the changes that were made, you can choose to **Discard check out**.



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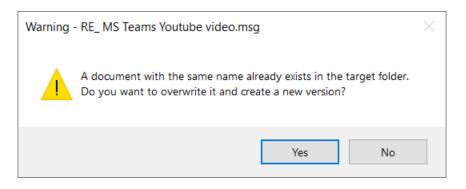
After selecting **Discard check out**, a warning pop-up window will appear. If you confirm that you want to discard the check out, you will lose all the changes that were made while the document was checked out.



#### Version creating

When a document is uploaded to SharePoint, it is automatically checked out to the user that uploaded it. To make the document available to other users, first it must be checked in.

If **versioning is enabled** on SharePoint - When you upload a document to a library where the same document already exists, officeGATE will ask if the existing document should be overwritten and new version created. If you select yes, officeGATE will overwrite the document on SharePoint and create a new version.



If **versioning is not enabled**, officeGATE will ask if the existing document should be overwritten. If you select yes, officeGATE will overwrite the document on SharePoint.

## Adding items to an email message

Sending as attachment



- Library item create a new message with selected document as attachment
- List item cannot be sent as attachment from its context menu
- Document set item create a new message with selected document as attachment

#### Sending as link

- Library item create a new message containing link to the selected document
- List item create a new message containing link to the selected item
- Document set item create a new message containing link to the selected document

#### Sending as ZIP file

- Library item put the compressed document into a new message
- List item compress the item properties into an HTML file together with item attachments to a single ZIP file and put it to a new message



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- Document set item - put the compressed document into a new message

#### Drag & drop into a message

- Library item add the document as attachment
- List item creates a table with property information and link to the selected item and its attachments



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- Document set item - add the document as attachment

### Outlook calendar entry creation

This feature is used for creating SharePoint and Outlook calendar items directly from Outlook.

To create a SharePoint calendar entry, right-click on an Events list or list item -> select **New** -> select **Event**.



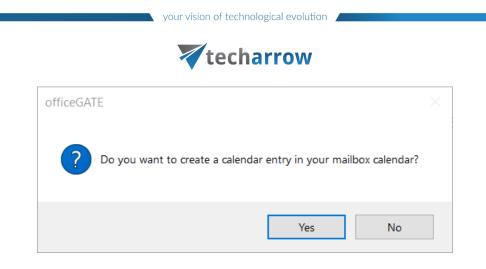
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The document metadata dialog will open. Here you need to fill in the required fields (marked with red asterisk). Click on **Save**.



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Description	
Please prepare the necessary documents.	
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All Day Event	
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Save Close	

After your item is saved and a new calendar item is created in SharePoint, officeGATE will ask you if you want to create a calendar entry in your mailbox (Outlook) calendar from it.



If you select **Yes**, officeGATE will search for fields containing usernames and/or email addresses and analyze the metadata of the newly created entry and use them in **Outlook calendar entry creation**. An officeGATE ID will be assigned to the Outlook item – this is used for synchronization with Outlook and SharePoint. If a user is added here as **Required** and/or **Optional**, he will get a notification email about the invitation.

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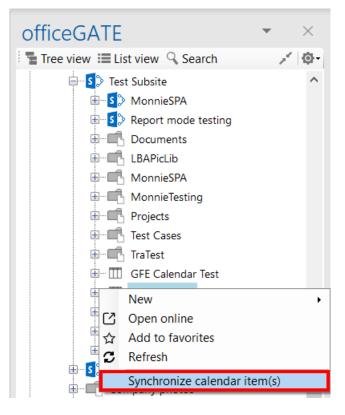
If an existing calendar or task item is edited in officeGATE and does not contain an information about officeGATE ID, then the option to retrospectively create an **Outlook calendar entry** for that item will be visible for the user. Once the entry is created, the **Synchronize calendar item(s)** button will become visible.

#### Synchronization options

#### **Tree view**

The context menu option **Synchronize calendar item(s)** is visible only if the selected item in officeGATE is a calendar.

When you click on the option, officeGATE will query all the calendar items of the selected calendar and if the description contains the Outlook calendar ID (mentioned above), the Outlook calendar item will be updated. SharePoint calendar items that don't have the Outlook calendar ID in description will be skipped.

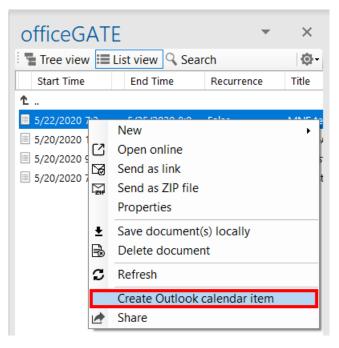


#### List view

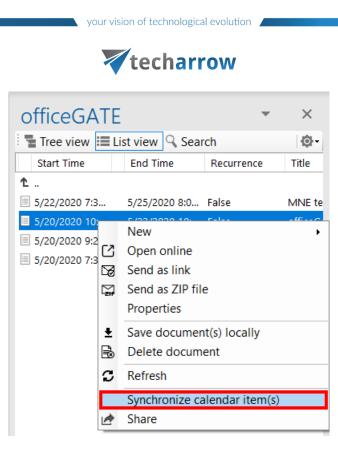
In the list view, there are 2 context menu options:



 Create Outlook calendar item - this will be visible if you open the context menu of a SharePoint calendar item from which an Outlook calendar item hasn't been created yet. When clicked, officeGATE will create an Outlook calendar item as described above.



Synchronize Outlook calendar item(s) - this will be visible if you have already created an Outlook calendar item from the selected SharePoint calendar item. When clicked, officeGATE will read the SharePoint calendar item fields and update the Outlook calendar item based on that.



#### Item details view

When you open a SharePoint calendar item in officeGATE, the item details view will be opened. Here are the same 2 buttons as in list view:

• Create Outlook calendar item - same as in List view



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Category +	
(None)	
All Day Event	
Recurrence	~
Created: 5/20/2020 2:24:05 PM	
Modified: 5/20/2020 2:24:05 PM	
Create calendar item Save Clos	e

• Synchronize Outlook calendar item(s) - same as in List view

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End Time *	
piatok , mája 22, 2020 ~ 10:00:00 dopc 🜩	
Description	
Please prepare the necessary documents.     	
Category +	
Meeting -	
All Day Event	
Recurrence	~
Created: 5/20/2020 6:03:18 PM	
Modified: 5/20/2020 6:09:42 PM	
Sync calendar item Save Close	

*Important:* If an item, which has been already synchronized, is deleted from the SharePoint event list, it will remain in Outlook calendar, as there's no synchronizing for the deleted items.



#### Teams data handling

officeGATE allows you to handle your Teams archive and Teams chat archive items, too. The difference, compared to all other providers and contentACCESS items, is that you **can't Drag&Drop items into Teams archive and Teams chat archive**.

Teams archive and Teams chat archive items offer the following options from their context menu:

- <u>Open</u>
- Open ACCESS Portal
- Send as attachment
- Send as ZIP file
- **Properties** this opens a preview of the item and allows the user to work with it as described in section <u>Double-click on contentACCESS items in List view</u>
- Save document(s) locally
- Copy document(s)
- <u>Refresh</u>
- Share



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	C	Refresh		
L	1	Share		
		S ≥ <u>Teams chat archive (EA_Test):</u> Meetings (3 items)	2	

## 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.

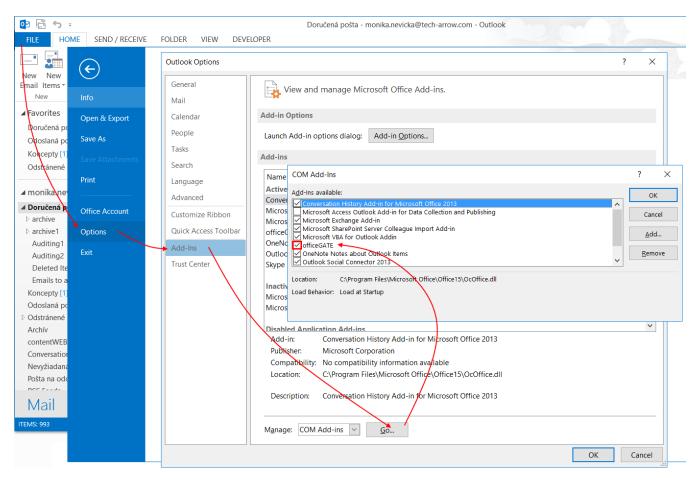


Here you can find some typical problems that might occur and the solutions to them:

#### > 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?:

ADD-IN PROBLEM A problem was detected with an add-in and it has been disabled. View Disabled Add-ins...

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	?	$\times$
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.