techarrow

contentACCESS Sharing

Manual – version 6.3

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Introduction

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

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

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

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

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

Compose form activation

In **Compose form**, the add-in is activated as a new custom task pane on the right side of the inspector window.
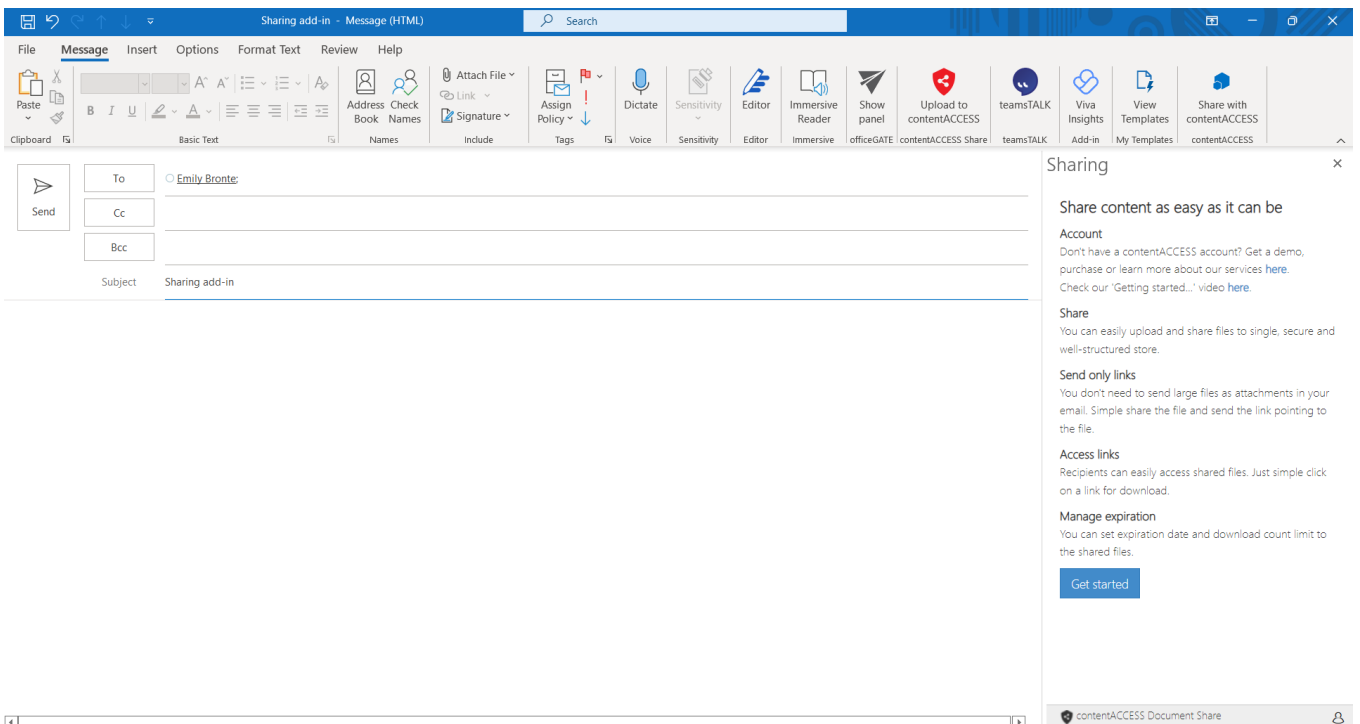
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Figure 1. contentACCESS Sharing add-in activation in compose form

Read form activation

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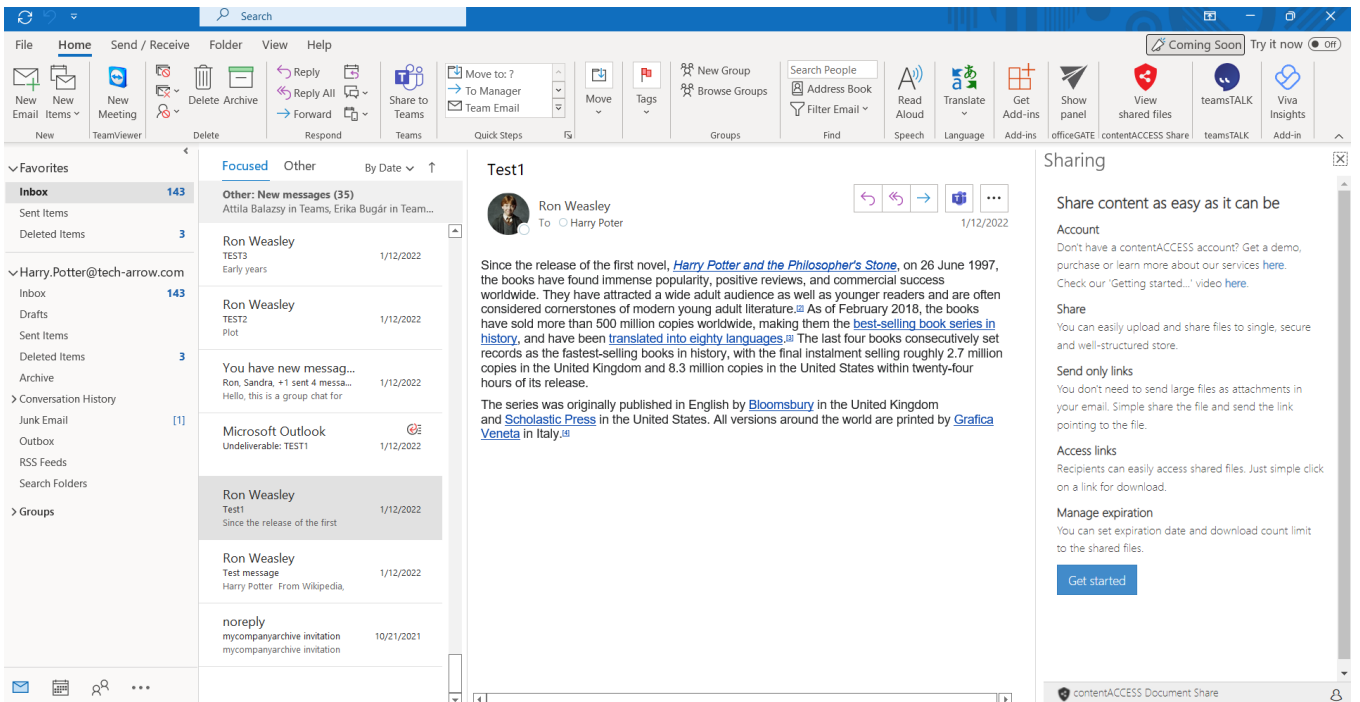

Figure 2. contentACCESS Sharing add-in activation in Read form

contentACCESS Document Share add-in functionality

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

Compose mode activation and usage

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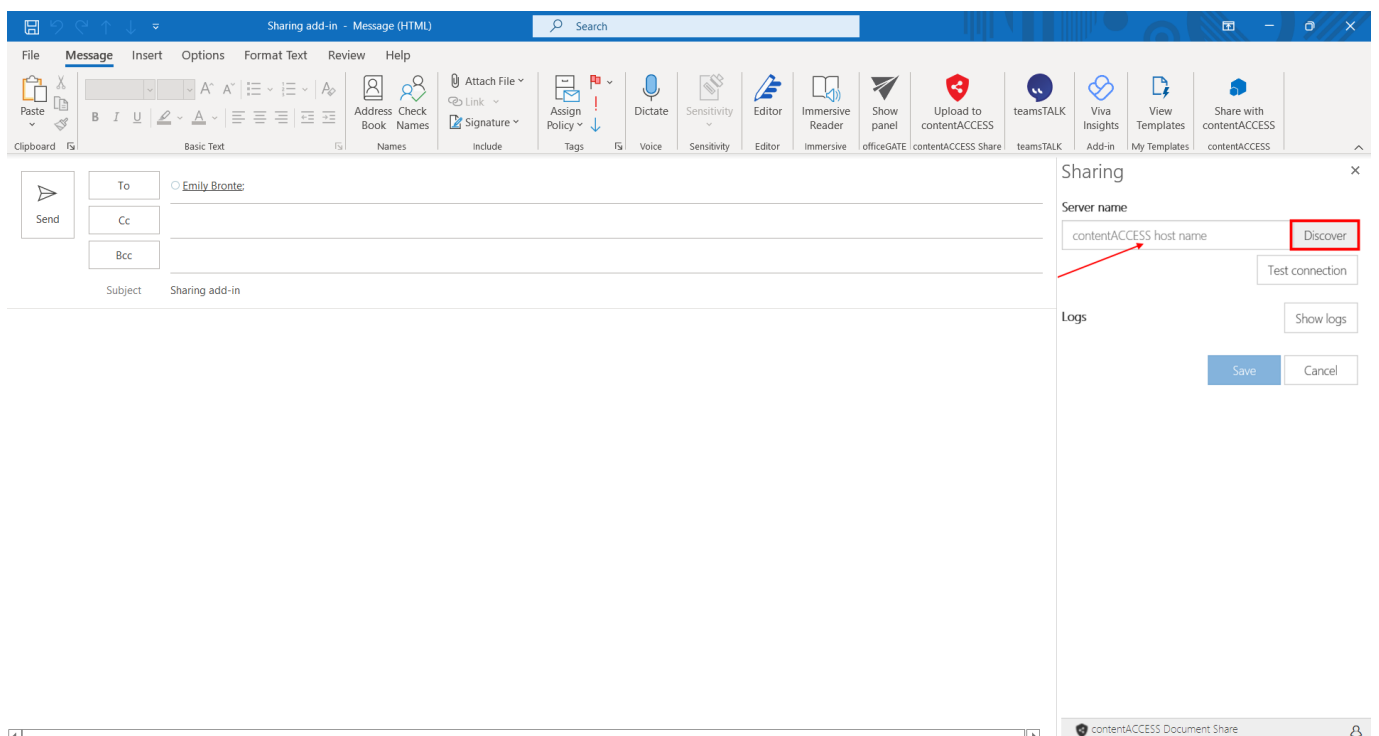

Figure 3. Connection page on first run

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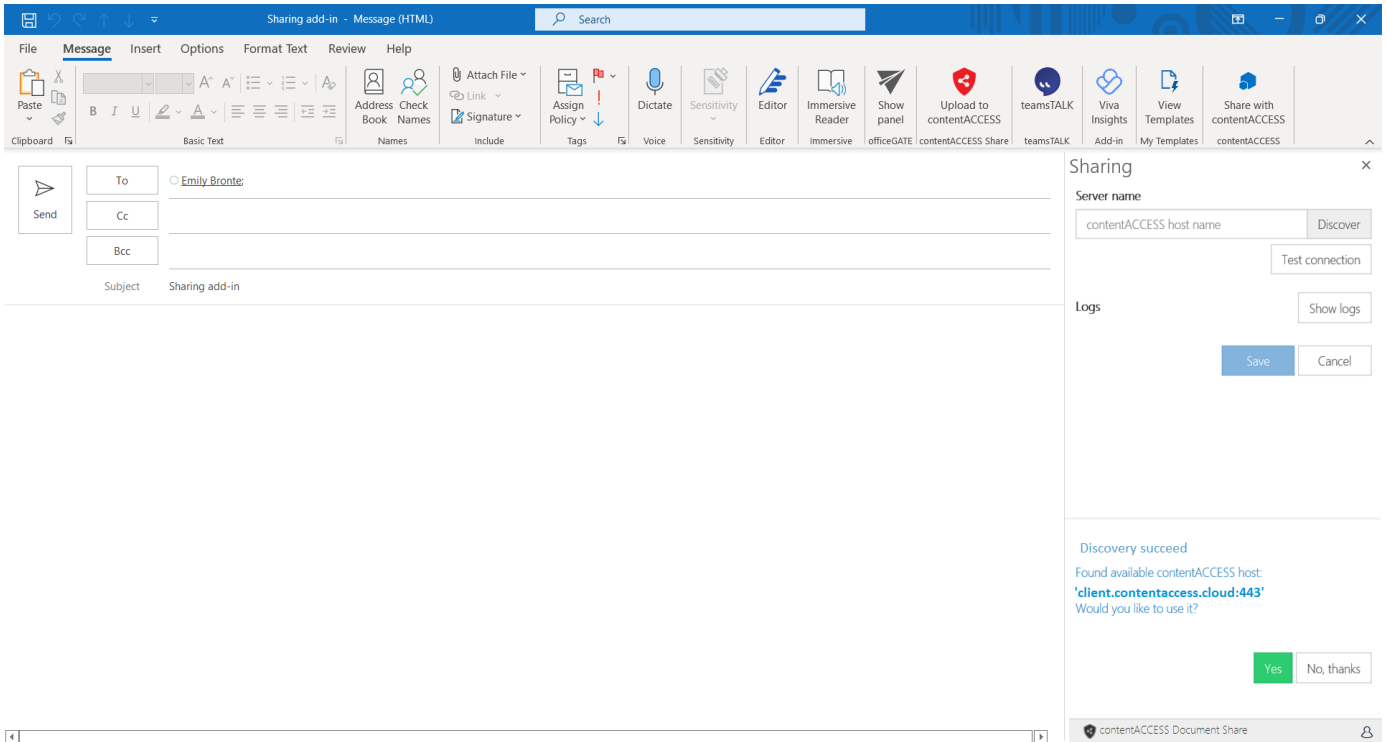

Figure 4. Message after successful discovery

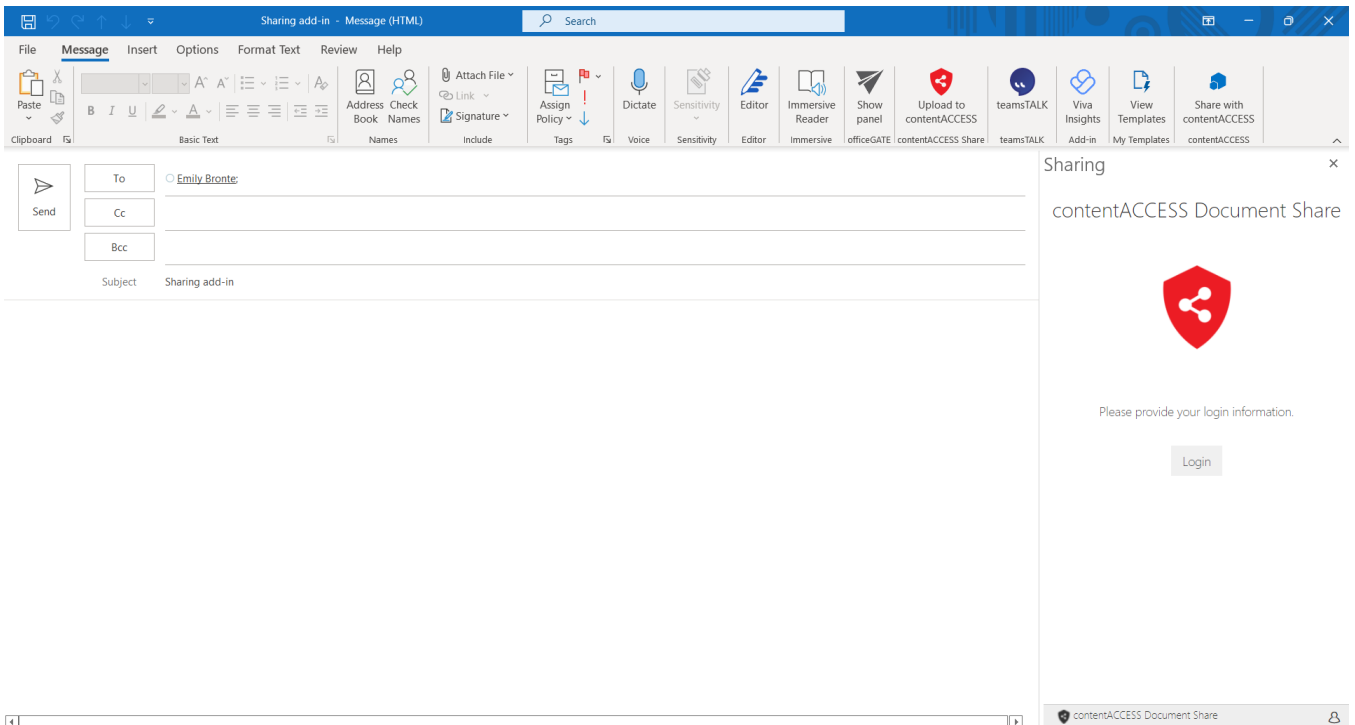5. After connecting to contentACCESS server, you will need to authenticate yourself.

Figure 5. Login button

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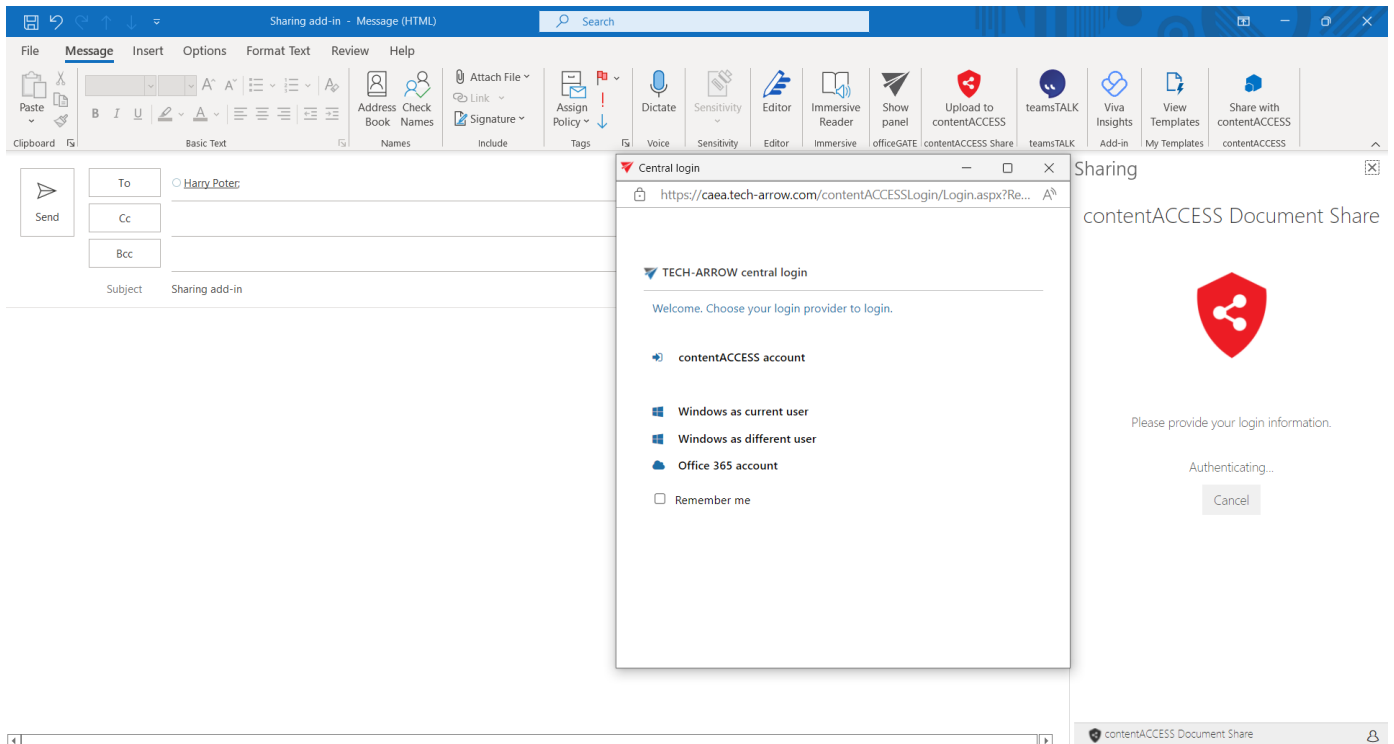

Figure 6. Login providers pop-up

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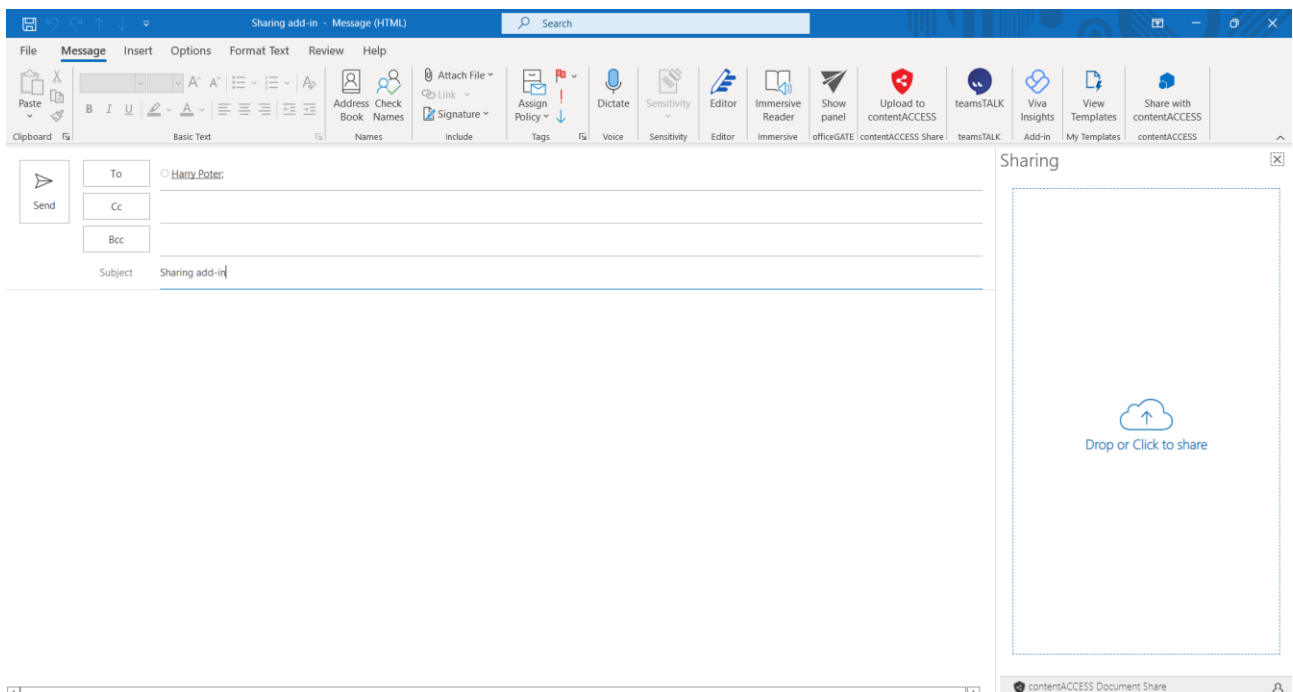
Figure 7. Upload page

8. Before the upload is completed, a dialog, where expiration date and download limit for the shared item has to be set, opens. It is also possible to get notification when the recipient(s) downloaded the shared item(s) by selecting the **Notify me about the downloads** function. If the user checks the **Remember these settings** checkbox, the app will use the values defined here for every sharing (the values can be changed from menu).
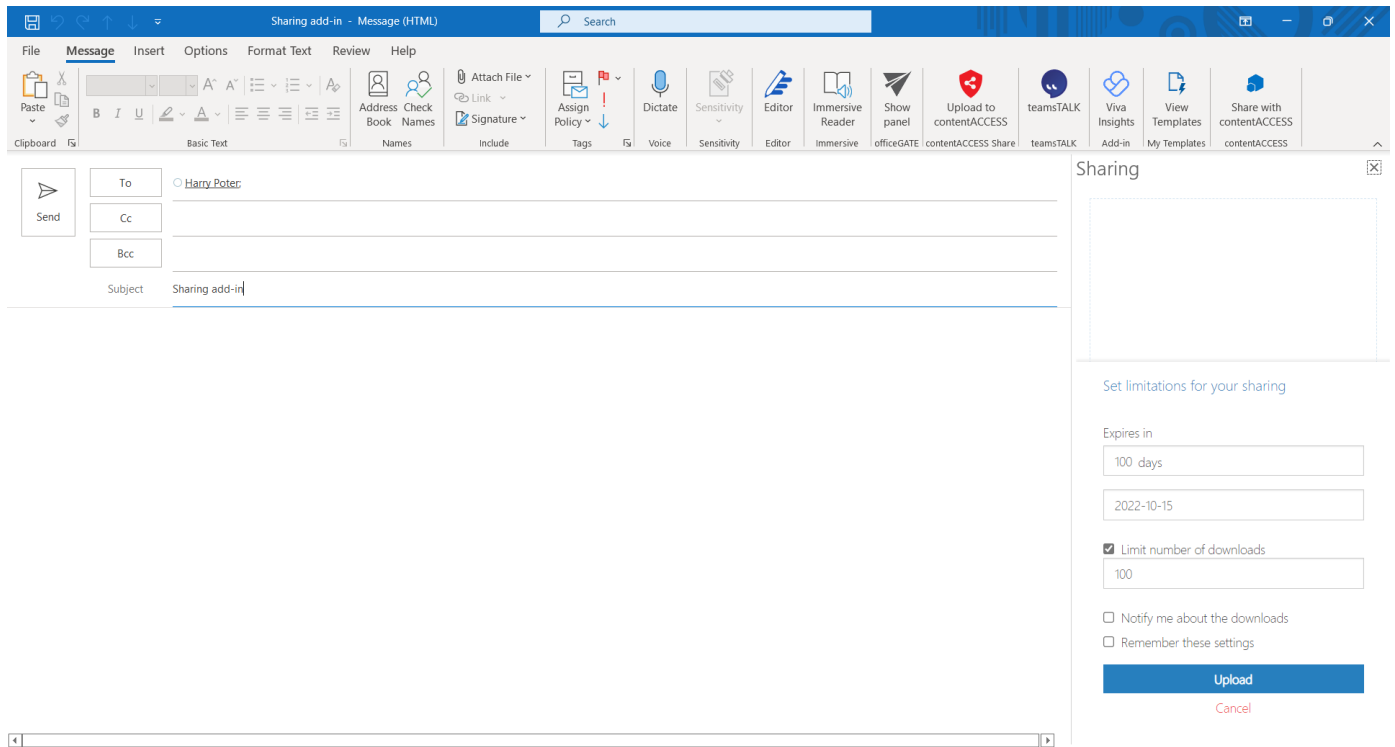

Figure 8. Setting limits for shared item

9. After clicking on the **Upload** button (if the **Remember these settings** checkbox was checked, step 8 will be skipped), the secure sharing page opens. On this page it is possible to see what item(s) will be shared and select who should be able to download the shared item(s):

- **Recipients only** - only recipients of the email
- **My organization** – everybody from the sender's organization, even if they are not recipients of the email
- **Public** - for example if the email is forwarded to other people

When the **Share with** option is selected, click to the **Finish sharing and insert link** button.

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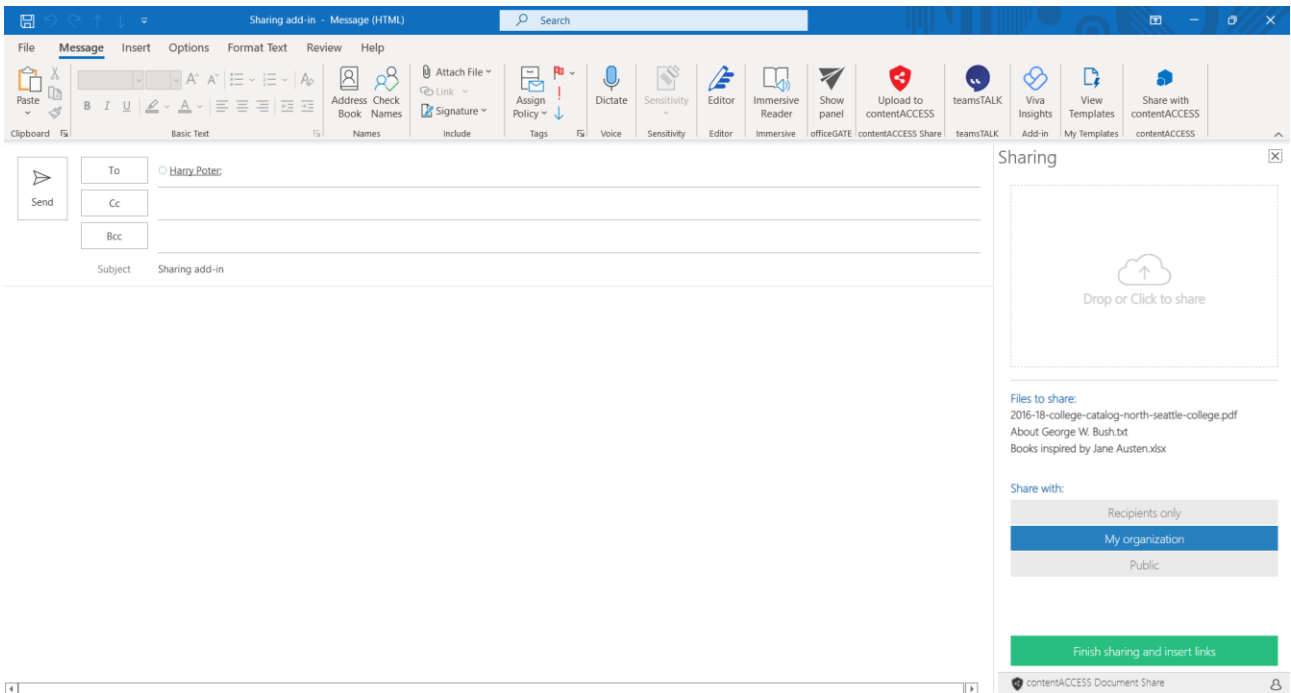
Figure 9. Selecting recipients for secure sharing

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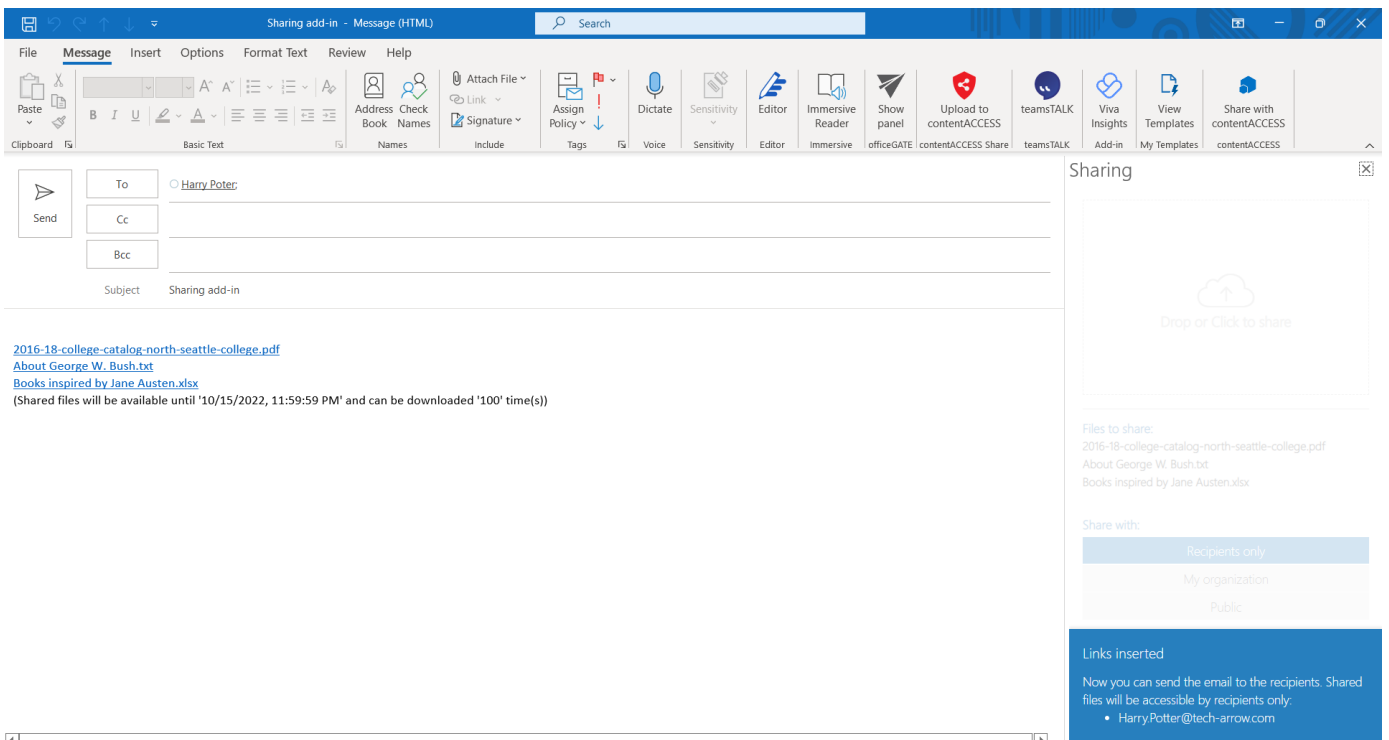

Figure 10. Successful upload

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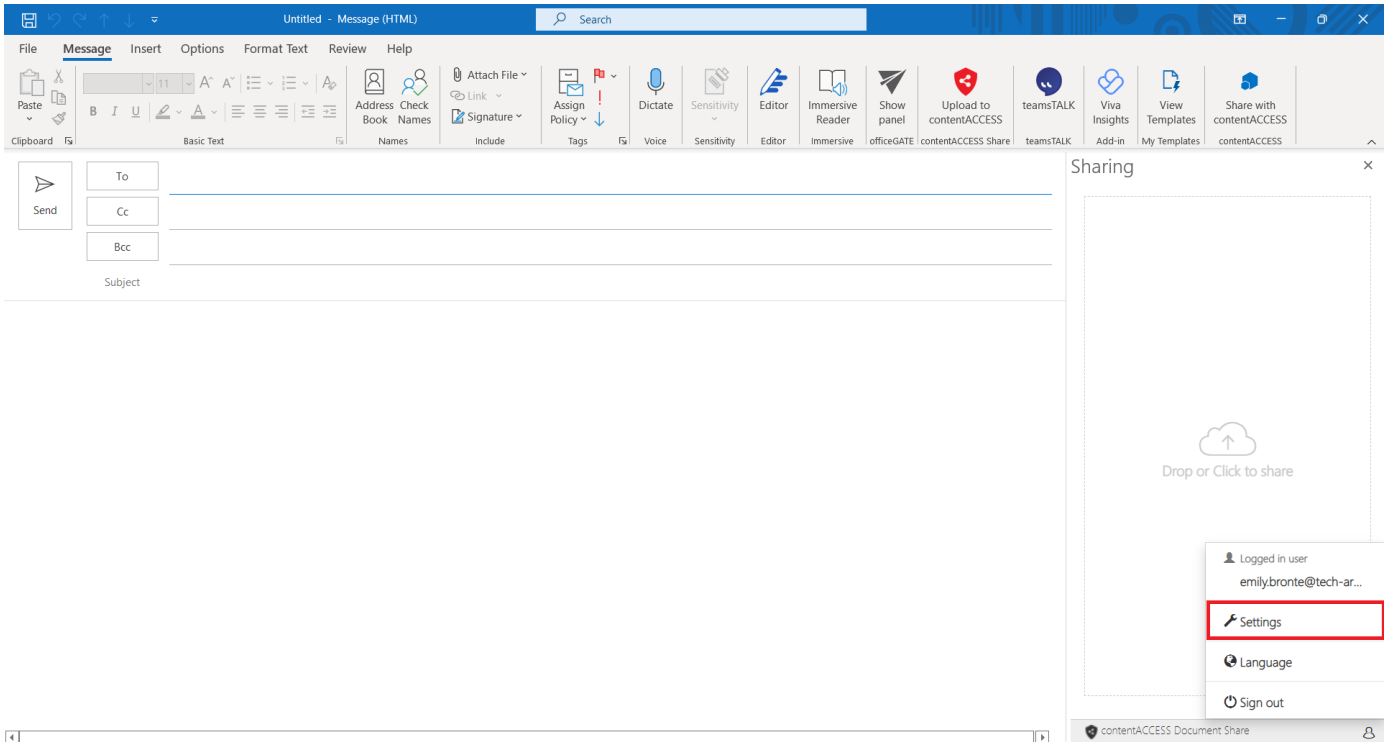

Figure 11. Opening the configuration page

It is possible to reset the **Expiration date** and the **Download limit** or check the **logs** here. Any change has to be saved by clicking on the **Save** button. To check if the connection with the server can be established, click on the **Test connection** button.

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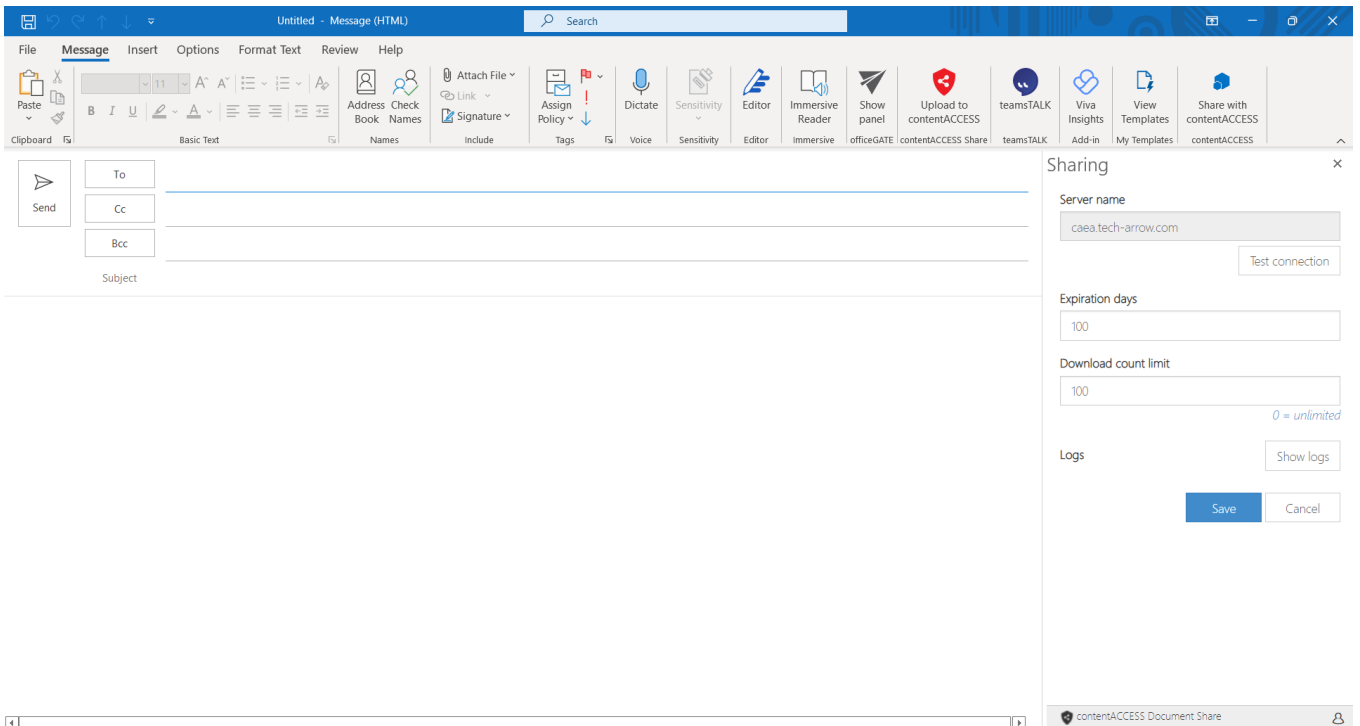
Figure 12. Configuration page

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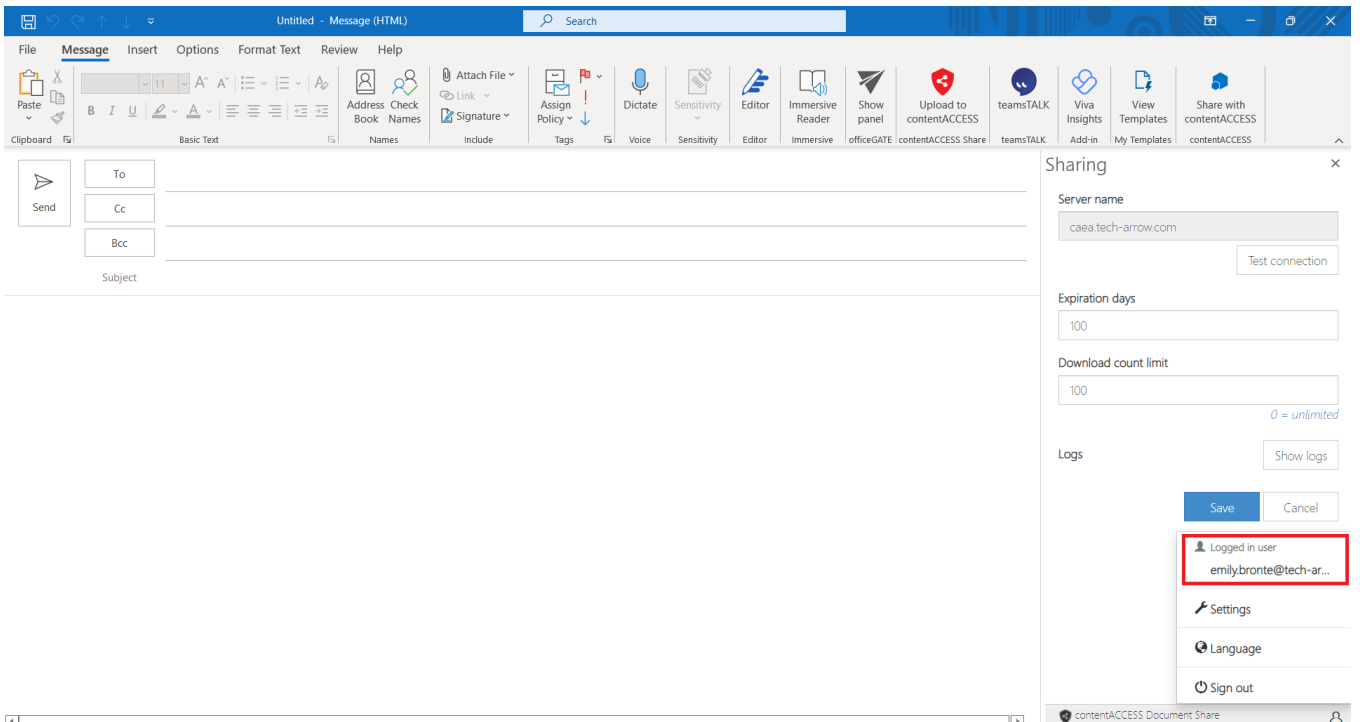

Figure 13. Configuration page and the drop-down menu

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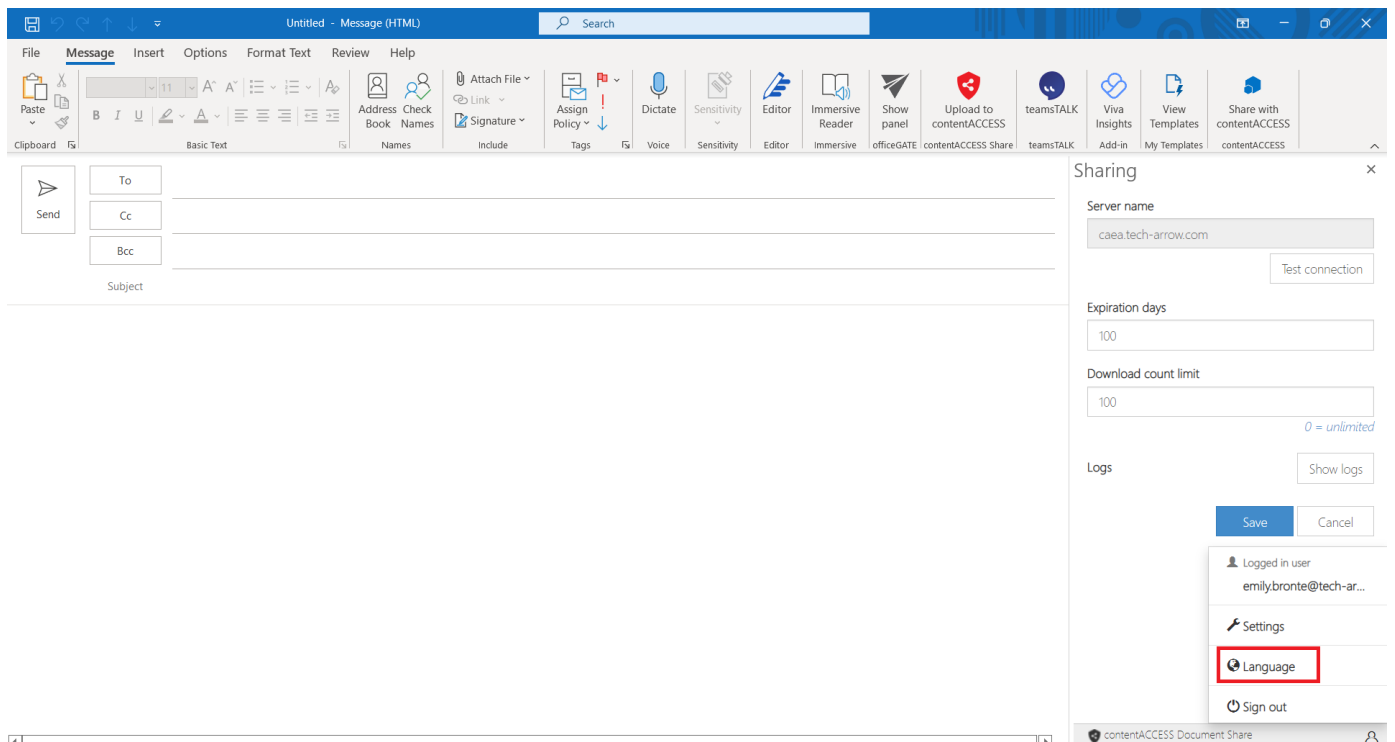

Figure 14. Language settings page in the drop-down menu

Read mode activation and usage

The add-in activation in **Read mode** is basically the same as in **Compose mode**. The activation is explained in the section above. After successfully logging in, you should see the list of links extracted from the body with additional information about expiration date and download count/limit state. The list also contains valid links – the user can click on the name, and it will be downloaded. Downloading may work differently on different platforms. The pop-up window appears when the user opens or downloads the shared item from the link, both in desktop Outlook and in OWA (browser version).
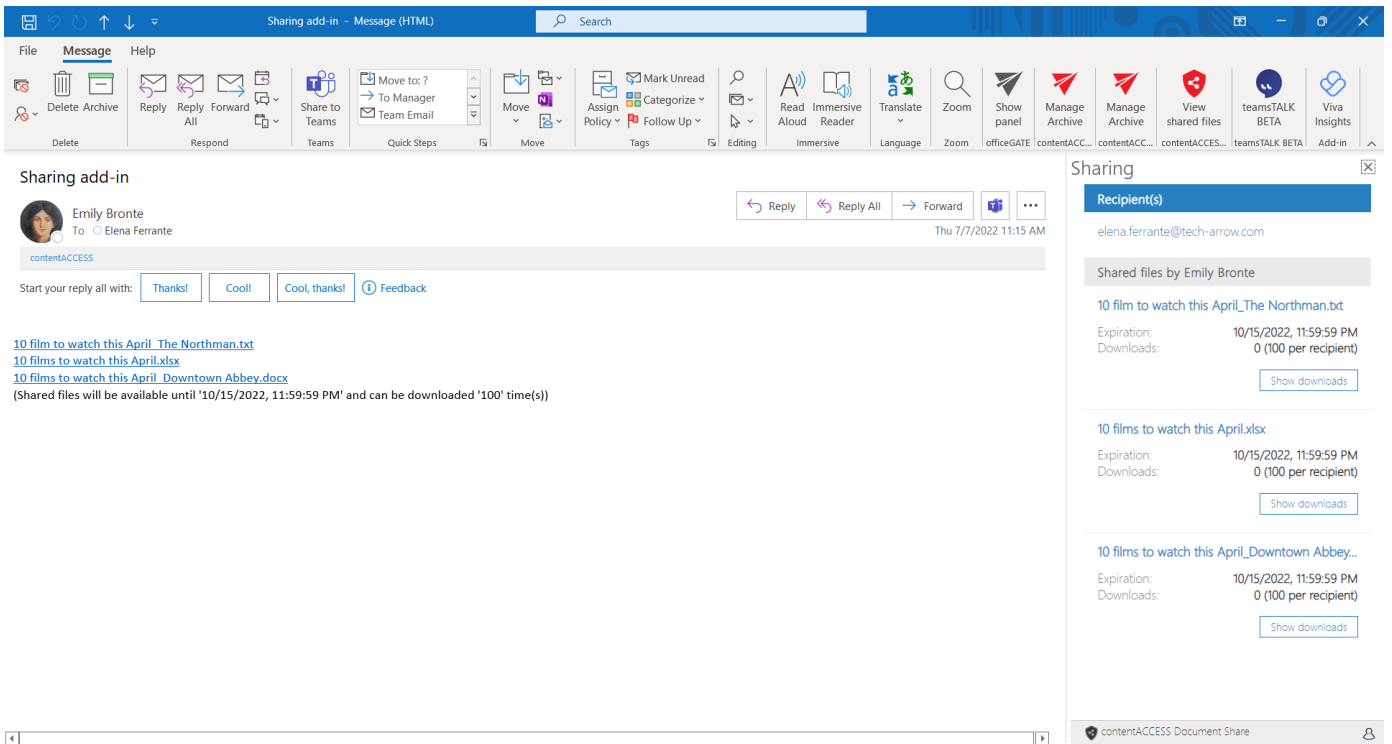
Figure 15. List of extracted links from body

If the user clicks on the shared link in the body or in the add-in's list, the shared item will be automatically downloaded from the browser.
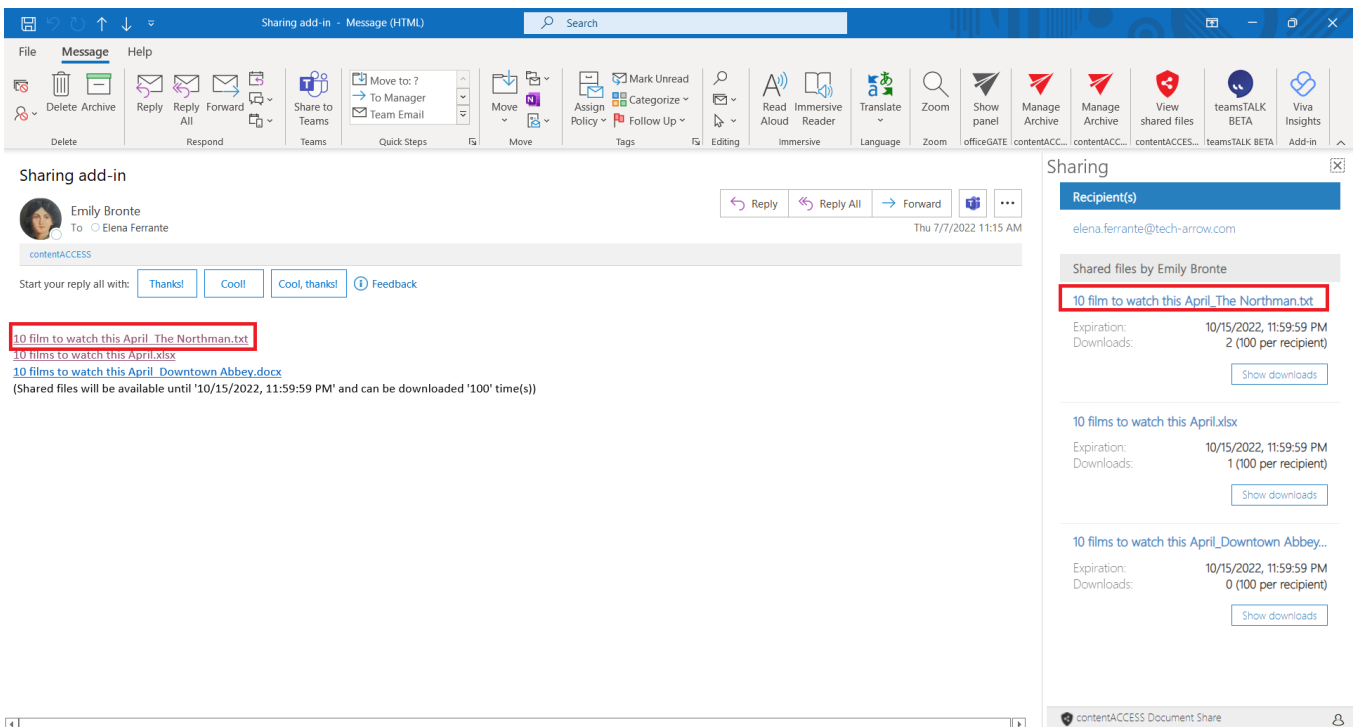

Figure 16. Downloading shared items

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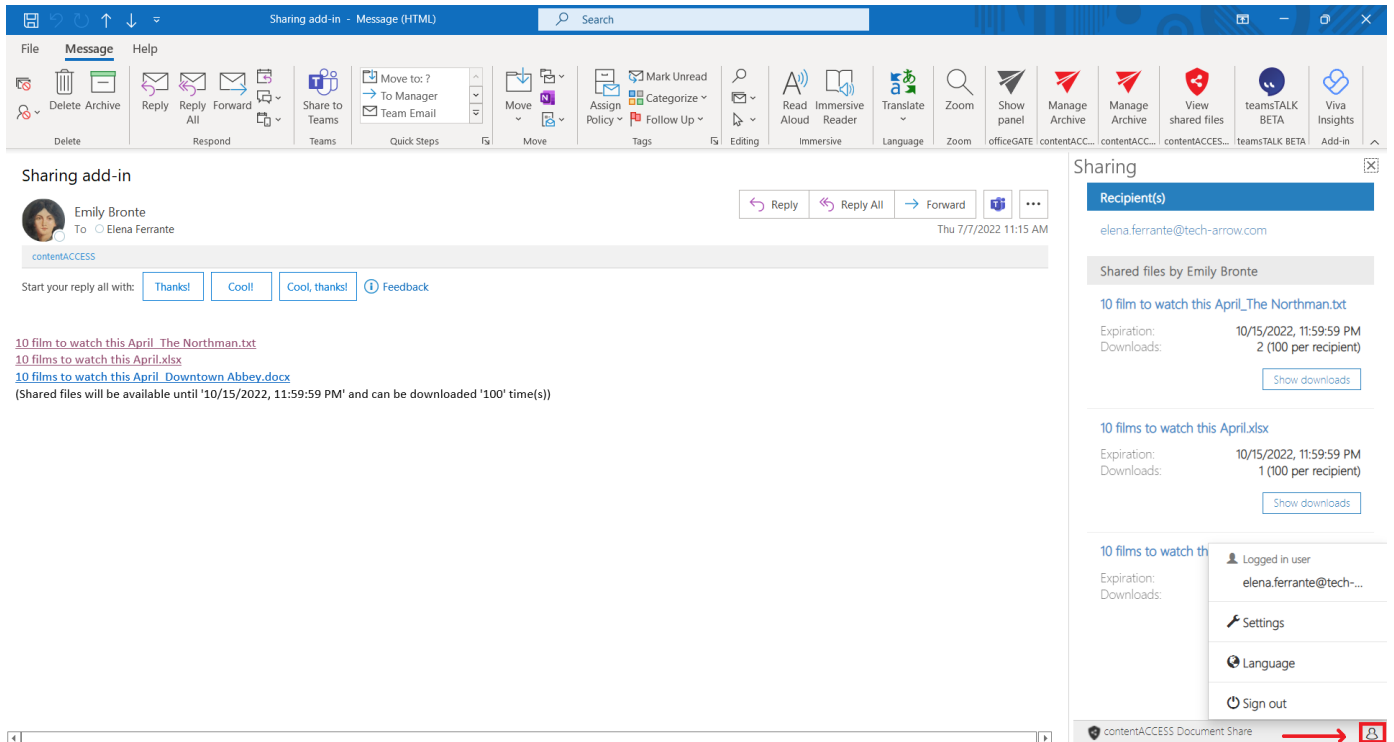

Figure 17. Opening the drop-down menu in Read form

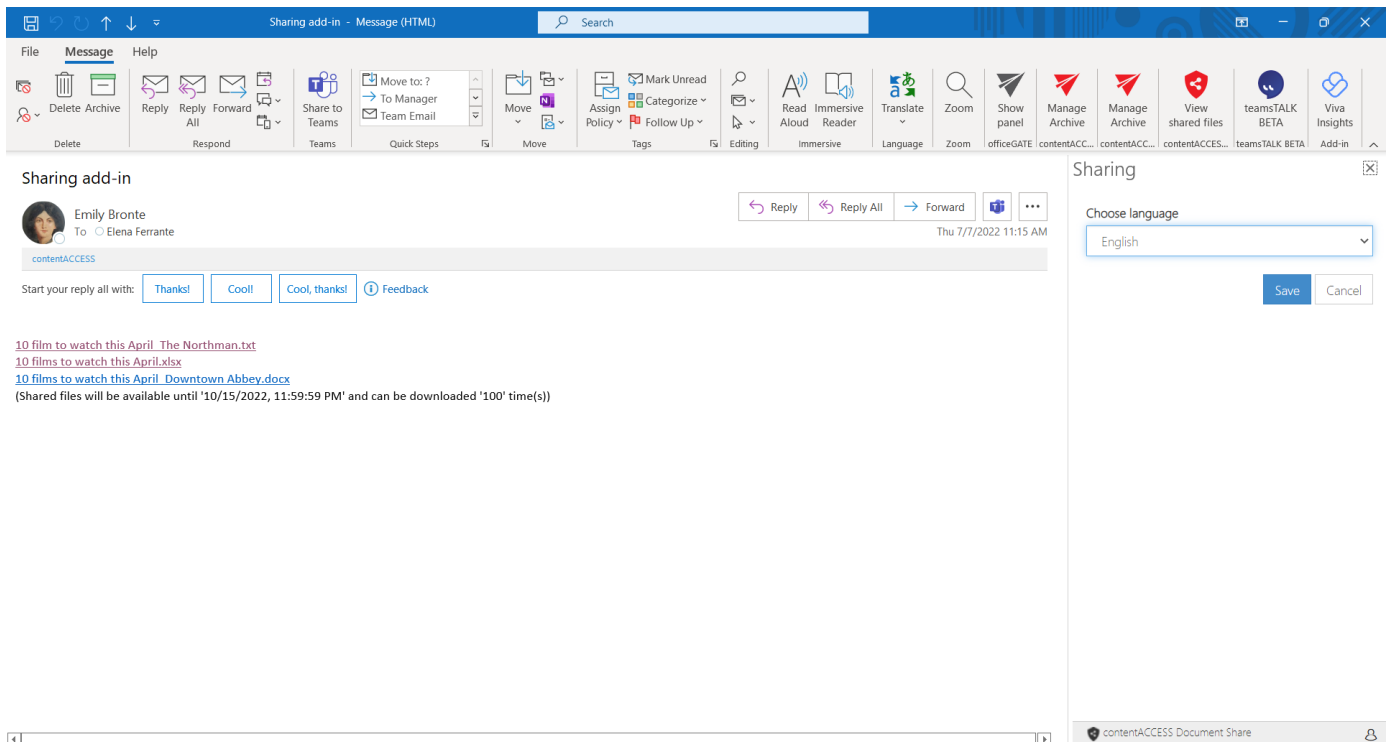The user can set the language of the add-in also in Read form.

Figure 18. Language settings in Read form

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

Changing the settings of your sharing

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

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

Now you can edit the settings of your sharing:

Sharing status

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

Sharing audience

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

Recipients

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

Expiration date

Simply pick a new expiration date from the calendar.
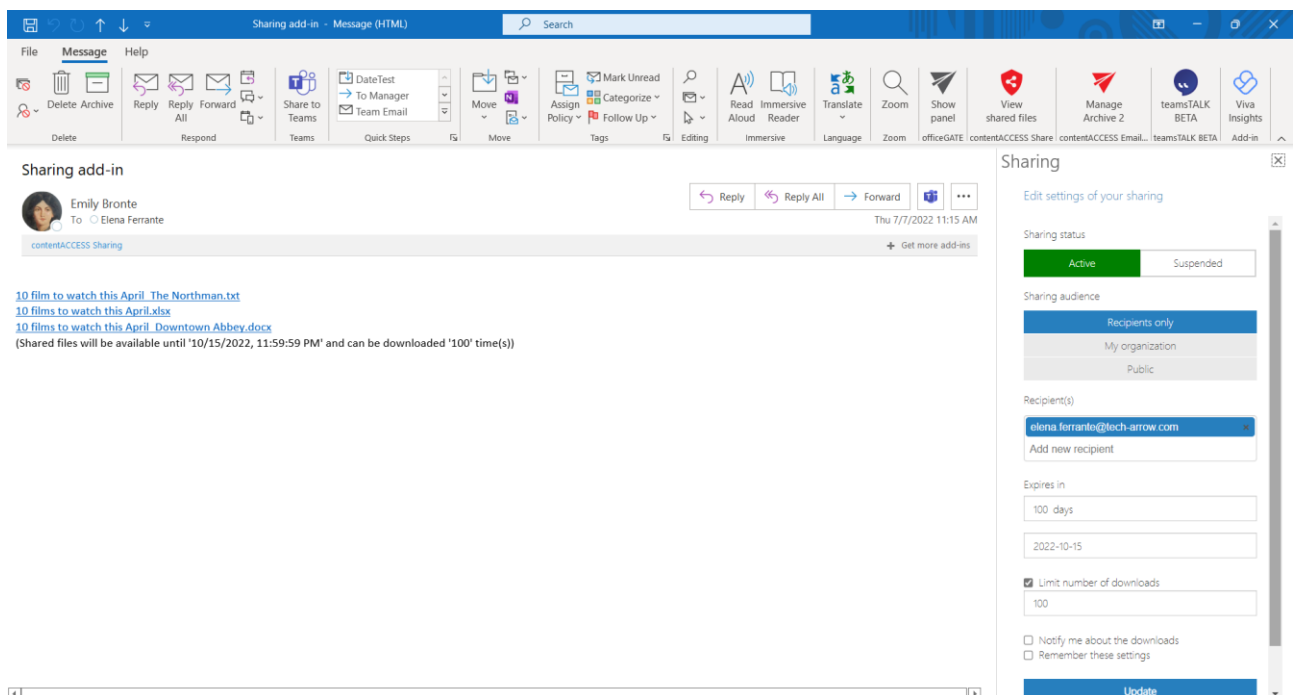
Download count/limit

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

Notify me about the downloads

You can get a notification when somebody (from the recipients' list, from your organization, or anybody else) downloaded the shared items. The notification email will contain the following information: who downloaded which item, when, and how many times.

Remember these sharing settings

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

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

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

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