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officeGATE
Manual – version 7.2

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Introduction to officeGATE

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

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

Key features

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

- ✓ **Customize your access with Favorites**. Define your own favorite folders or SharePoint sites.
- ✓ **Share big files** directly from your MS Outlook mailbox.
- ✓ **Connect to multiple SharePoint sites**.
- ✓ Directly from Outlook you can use SharePoint's **content type selection and metadata fill** features.
- ✓ **USE IT FOR FREE** or pay for the Premium version.
- ✓ **Premium version** features: Connection to multiple SharePoint sites, Automatic upload, Rules Definition.

Software requirements

- Microsoft .NET Framework 4.8
  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
  https://www.microsoft.com/en-us/download/details.aspx?id=35585
- Classic Outlook – Outlook 2016/2019/2021 and Microsoft 365 with older interface

Note: Pleae note that officeGATE is **not compatible** with modern Outlook versions (Outlook (new) or New Outlook).

- Visual Studio 2010 Tools for Office Runtime*
  https://www.microsoft.com/en-us/download/details.aspx?id=105522

** 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 officeGATE section in the contentACCESS manual.

2. **Subscription based version** – get the add in from the TECH-ARROW store. 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.

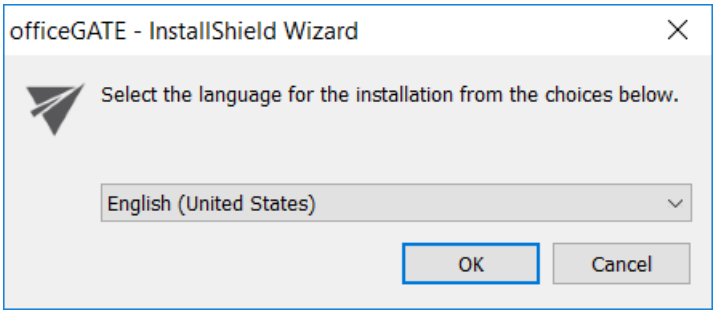
The application can be installed with 2 kinds of setup files: either with EXE or MSI:

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.

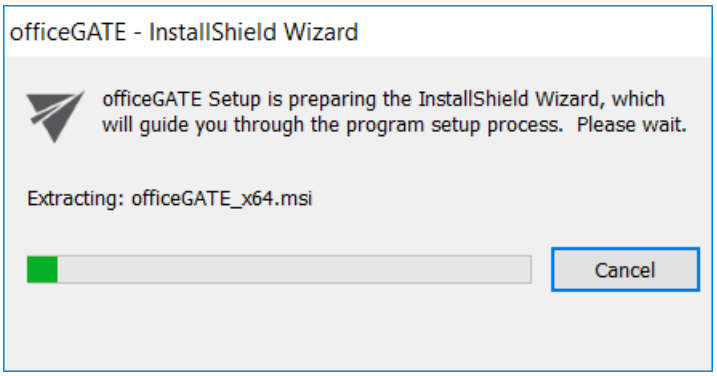
Single installation of officeGATE

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

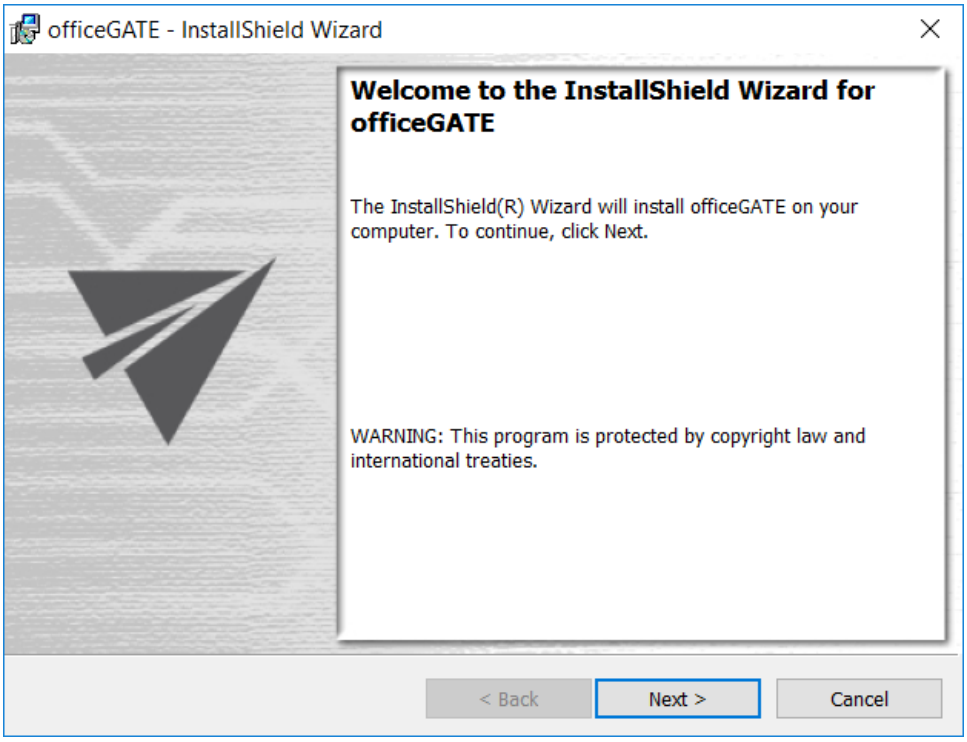


***Hint**: By The Group Policy instlallation only the English language is supported. For detailed information about GPO installation refer to chapter [Installation of officeGATE in a distributed company environment using Group Policy](#) of this guide.*

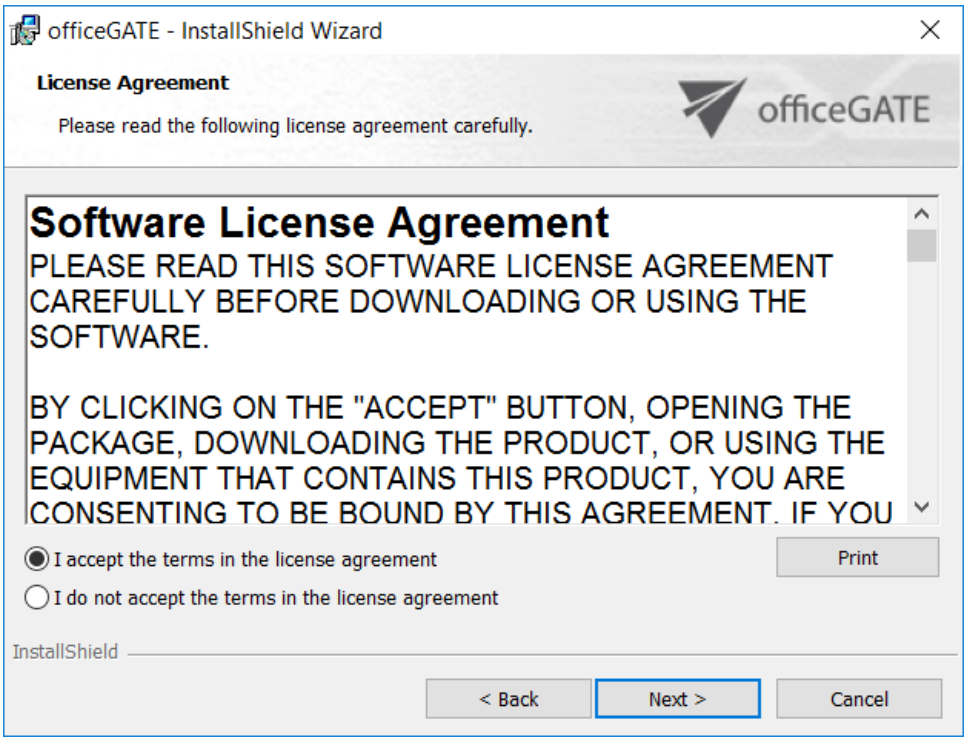
3. Run the setup package and follow the on-screen instructions.



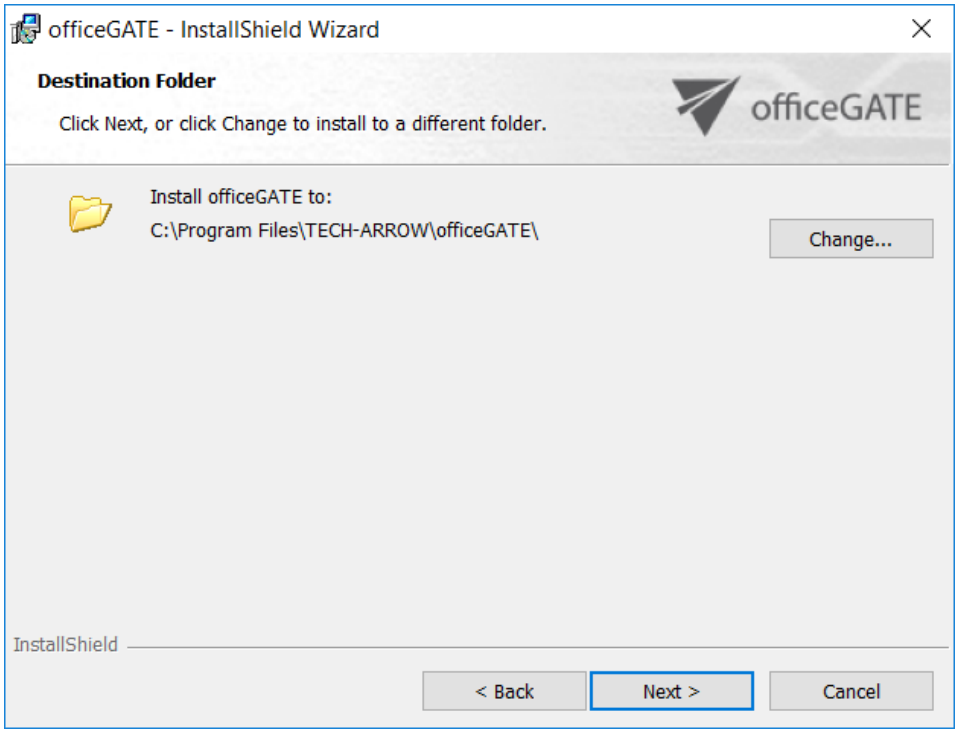
4. The officeGATE InstallShield Wizard will appear as shown on the screen below. Click **Next**.



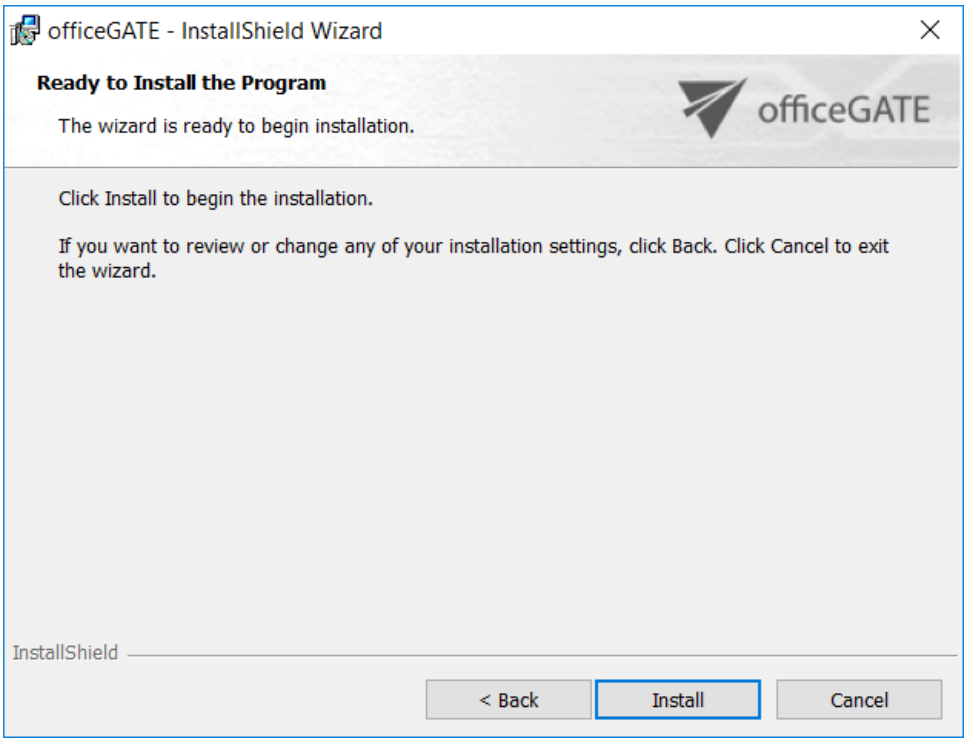
5. In the next step click on **I accept the terms in the license agreement** radio button and click **Next**.

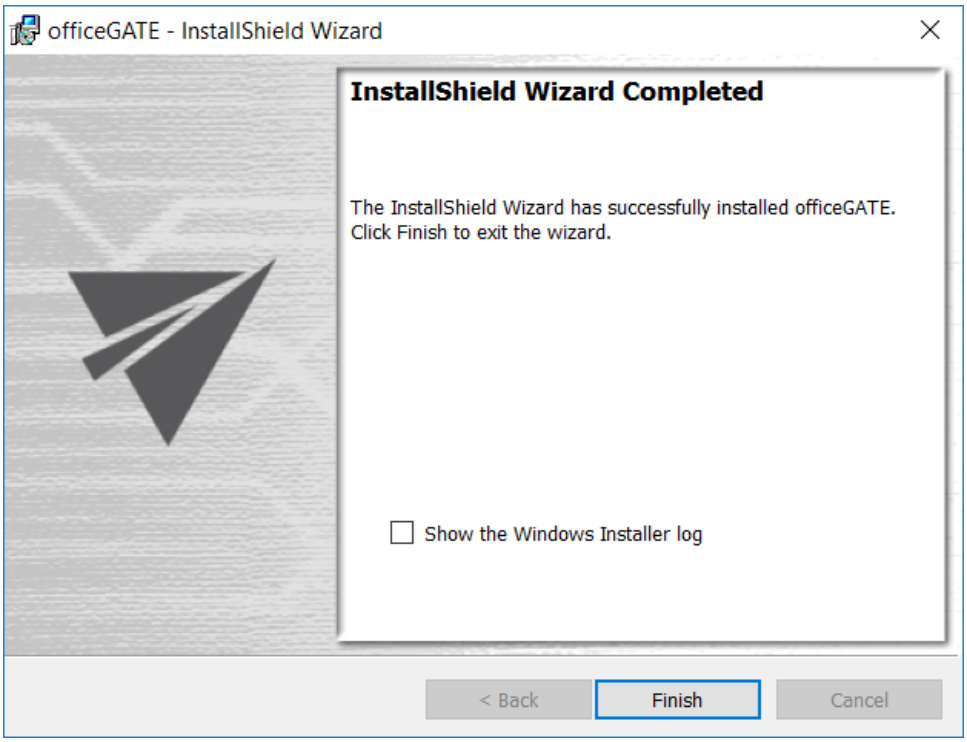


6. Choose the destination folder where officeGATE will be installed on your PC and click **Next**.



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

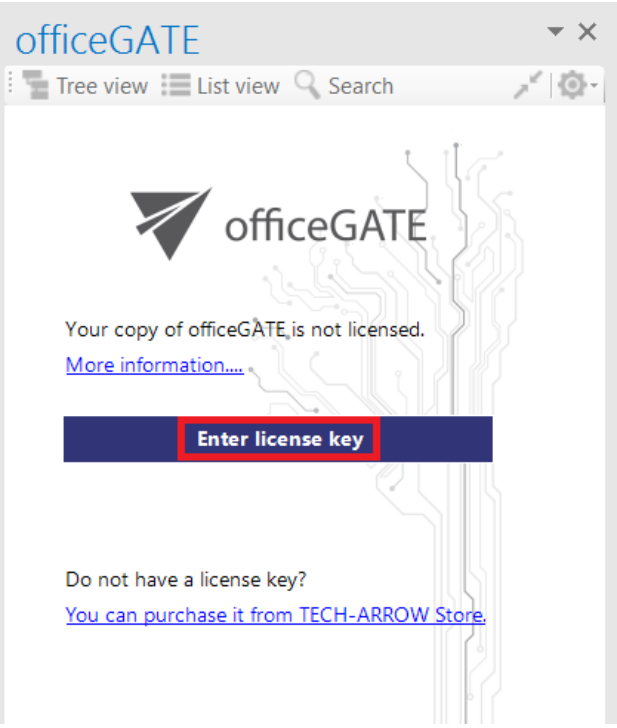




The last window of the installation process will offer for the user to open the Windows Installer log. Wish you check it, mark the “Show the Windows Installer log” checkbox. In case that you would not like to open it leave this checkbox empty.

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 this 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 **%AppData%\officeGATE** directory. There is one global configuration file containing settings for officeGATE and separate files for each provider.

The list of configuration files is the following:

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

OneDriveSettings.xml	Configuration file for OneDrive provider. Can be configured using the provider configuration dialog.
EIMConfig.json	Contains configuration settings for EIM connection.

The global configuration file (Settings.xml)

Configuration key	Value	Description
PanelShown	True/false	Specifies whether to show officeGATE panel on Outlook startup.
CtrlToUse	True/false	By default drag and drop to Outlook copies the link to the document. Holding the CTRL key copies the document itself. Setting "true" makes the function to work the opposite way.
ShowTooltips	True/false	Specifies whether to show tooltips in tree view.
ShowInMailCompose	True/false	Specifies whether to show officeGATE panel in mail compose window.
HiddenProviders	List of tags	Identifiers of providers that should not be shown in officeGATE.

SelectedLanguage	One of these values: en, de, no, zh-Hans, pt, sk, ar, cs, pl, hu, el	Two-letter code of the user interface language.
SwitchToGridViewWithMiddleMouseClick	True/false	Specifies whether to enable switching between tree and grid view with middle mouse click.
CloseFoldersAutomaticallyInTreeView	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.	The maximum age of items that should be offline synchronized.
OfflineSyncItemMaxAge.Value	Integer	The value for the *OfflineSyncItemMaxAge* configuration setting.

OfflineSyncItemMaxAge.Unit	One of these values: Day, Week, Month, Year	The time unit for the *OfflineSyncItemMaxAge* configuration setting.
DisablePanelToggling	True/false	Specifies whether to hide the "Show panel" button on Outlook ribbon.
OfflineSyncThreadCount	Integer	Specifies the number of offline synchronization threads (recommended 2, maximum is 8).
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 https://www.w3.org/TR/xmlschema-2/#adding-durations-to-dateTimes	Specifies the interval of the automatic synchronization.
OfflineSyncThrottling	Integer	Specifies the length of artificial idle states during the offline synchronization, in milliseconds. Set this value if the offline synchronization causes high CPU utilization.

MinimumFreeSpaceShouldLeft	Integer	Specifies the minimum free space that should left on the drive which contains the offline database, in megabytes. This value helps to avoid filling the disk with the offline database.
PageSize	Integer	Specifies the number of items to be loaded at a time by the list view.
ShowItemCount	True/false	Specifies whether to show the total item count under the list view.

The contentACCESS provider configuration file (OGcontentACCESSSettings.xml)

Configuration key	Value	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.UseIntegratedAuthentication	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 *<Password>* tags	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	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.

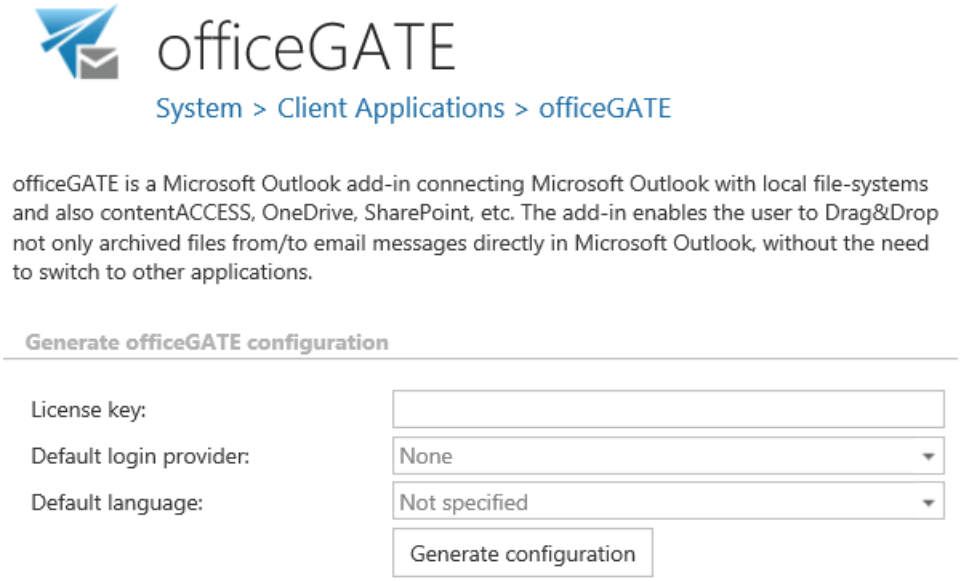
For detailed instructions how to use GPO to distribute XML files refer to chapter "How to copy officeGate_Configuration.xml using Group Policy" of this guide.

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:

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

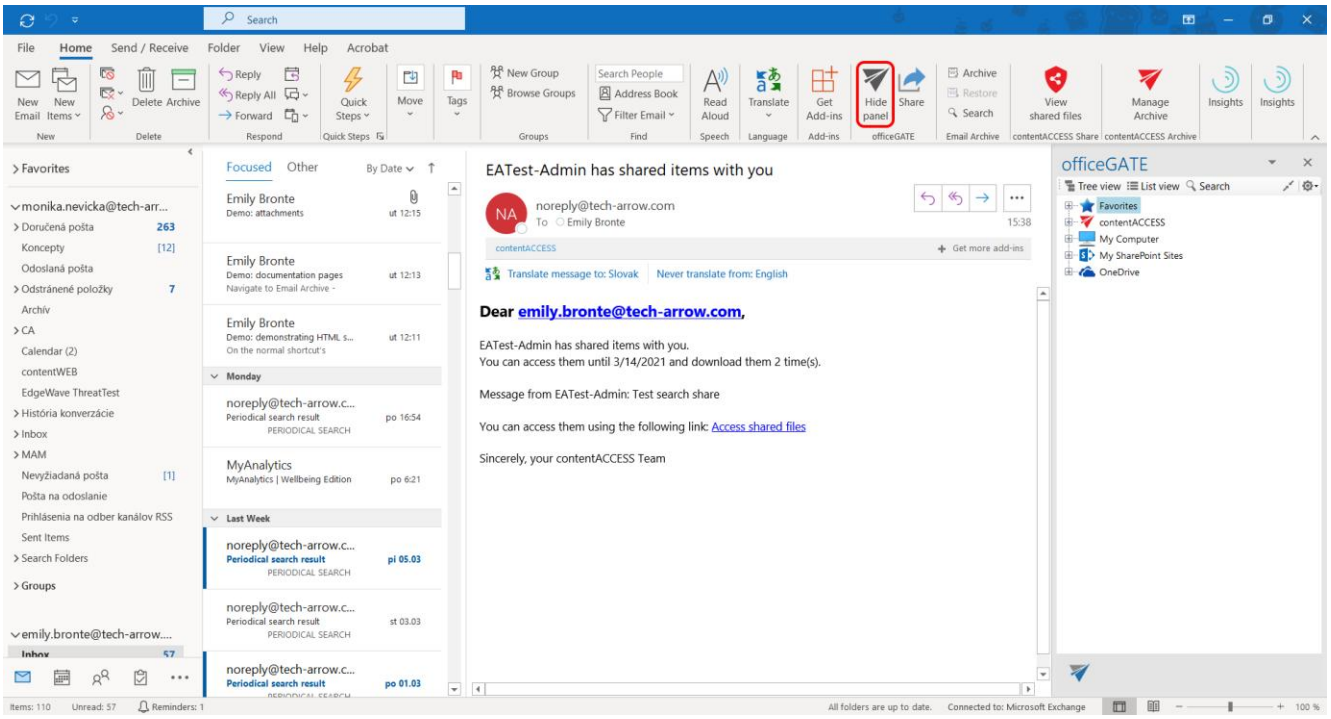


2) Further distribute the XML files with the Group Policy based on the "How to copy officeGate_Configuration.xml using Group Policy" chapter of this guide.

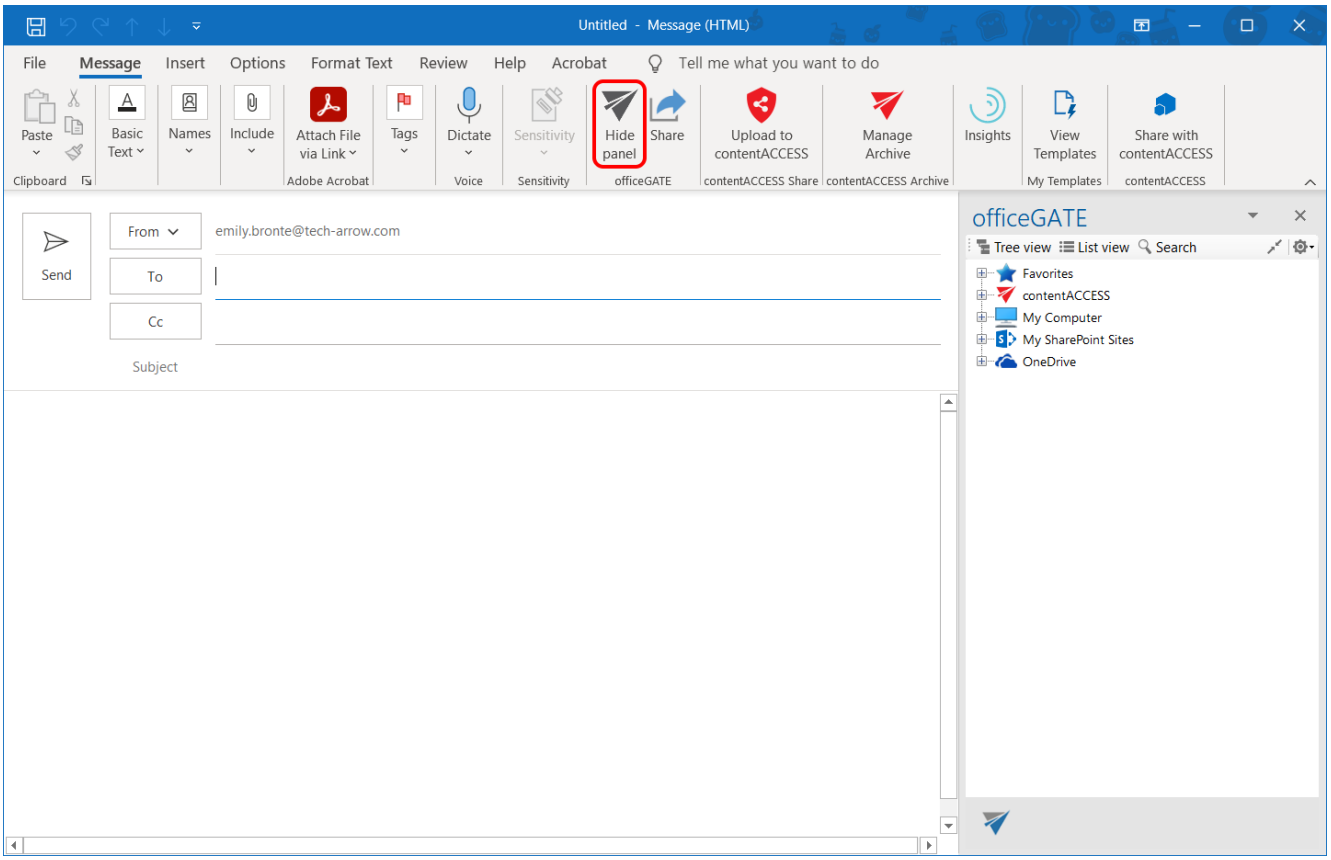
3) Finally install officeGATE using Group Policy installation.

Launching officeGATE

To launch and display officeGATE, open MS Outlook and click on the **Show panel** / **Hide panel** ( ) button. By clicking the button again you hide the officeGATE panel.



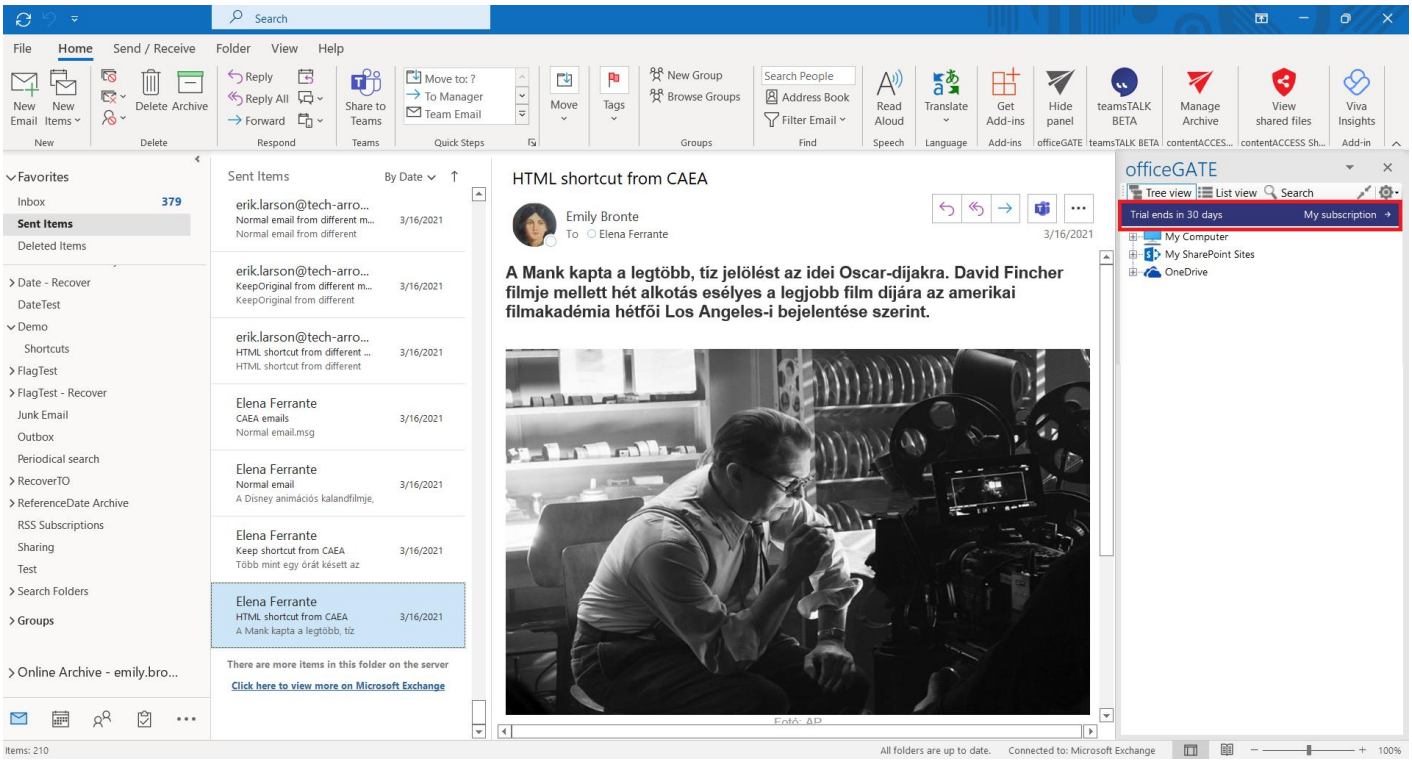
The officeGATE panel can also be accessed in a compose e-mail message window. To show it, click the officeGATE button ( ) in any message.

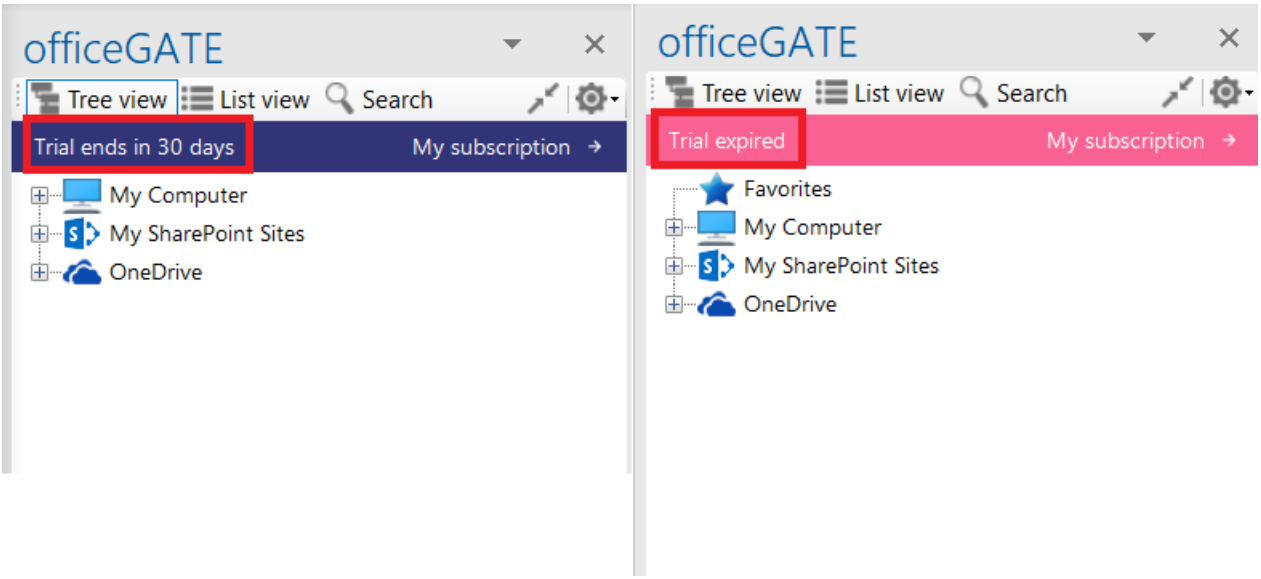


If officeGATE is downloaded and isntalled from the store, then a **notification bar** is displayed in the pane. The user can follow here when the trial/subcription ends and check their subscriptions (account, orders, downloads, account details) in the TECH-ARROW store by clicking on the **My subcription**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

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**".





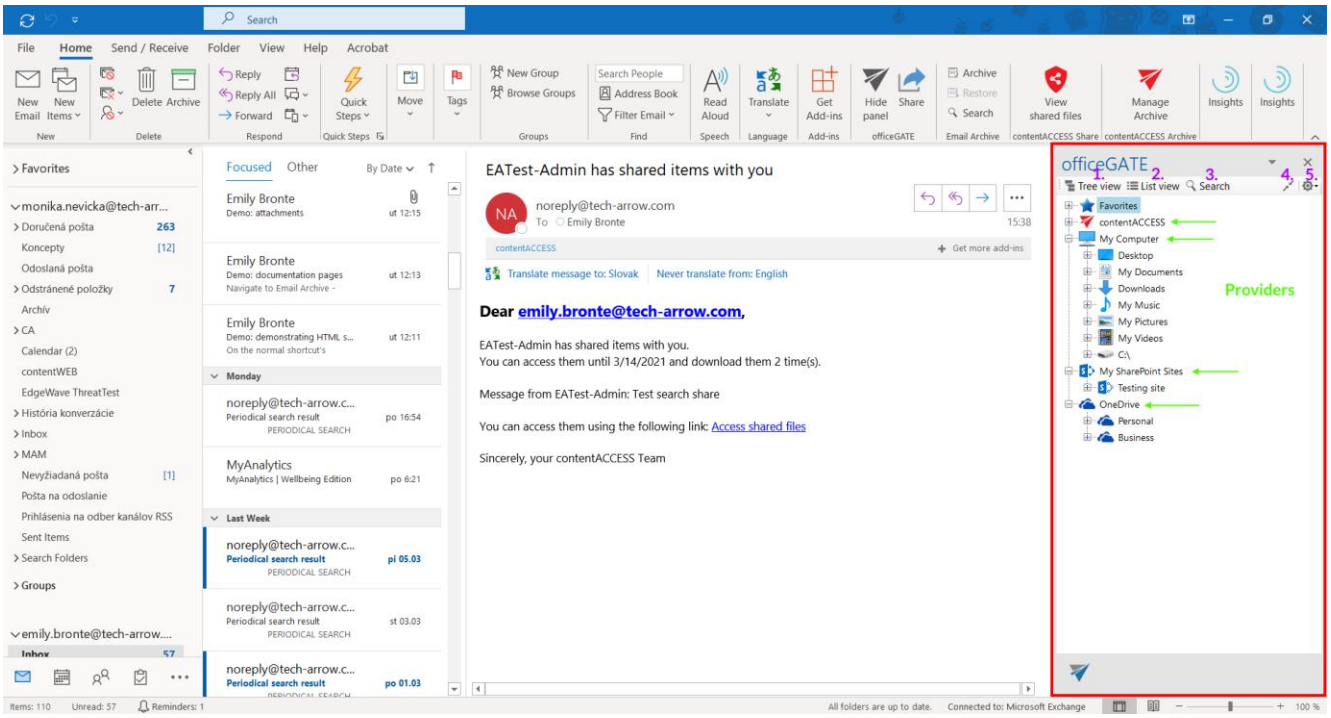
Note: In case you have troubles with displaying officeGATE check [Troubleshooting](#) section in this manual.

officeGATE pane's overview

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

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

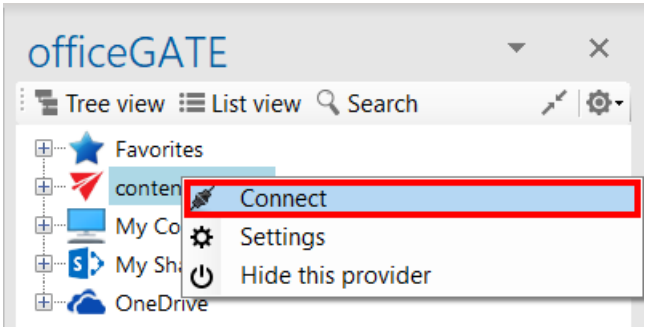
The providers are listed alphabetically in the pane. We marked them with green on the screenshot below. Many of these providers are already expanded so their contents are also visible. Use the folders and the items context menu items to work with your folders/libraries/documents.



Connection settings

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

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



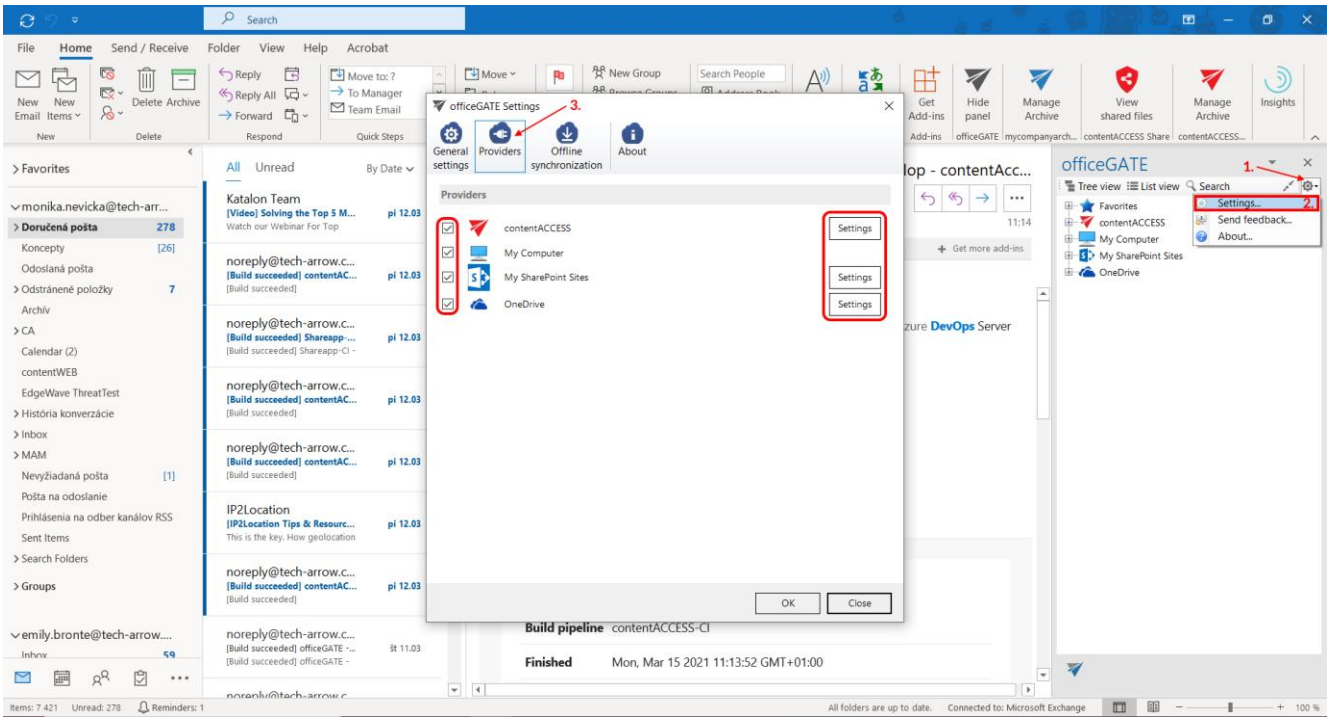
Enabling/disabling providers

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

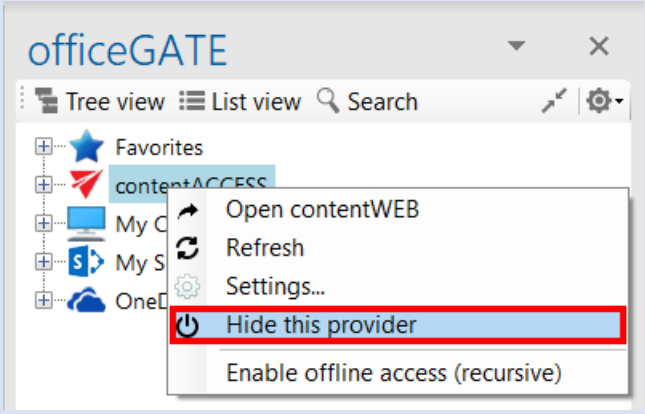
The default connection setting can be changed in officeGATE settings as described below.

Enabling/disabling the officeGATE providers. In the officeGATE's pane click on the button and choose **Settings...** as shown on screenshot below. In the **officeGATE Settings** dialog switch to the **Providers** tab. All available providers (contentACCESS, Perceptive Workplace, My computer, OneDrive, SharePoint) are listed on this tab. Check/uncheck the desired provider's checkbox to show/hide it. Wish you connect to a system, click on the **Settings** button to configure required connection settings. These

connection settings can be also accessed using the providers' context menu and will be described in more details in chapter Connecting to providers.

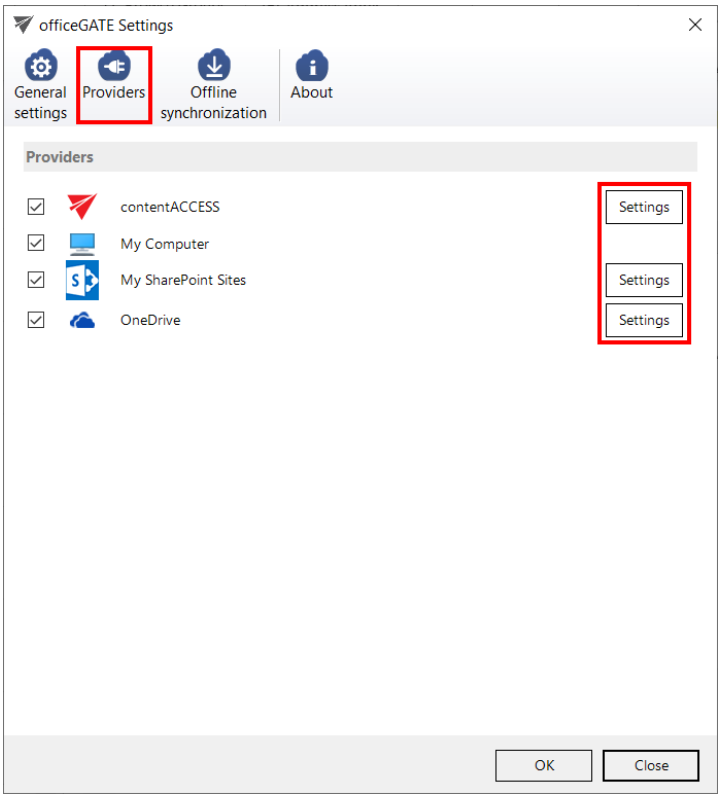


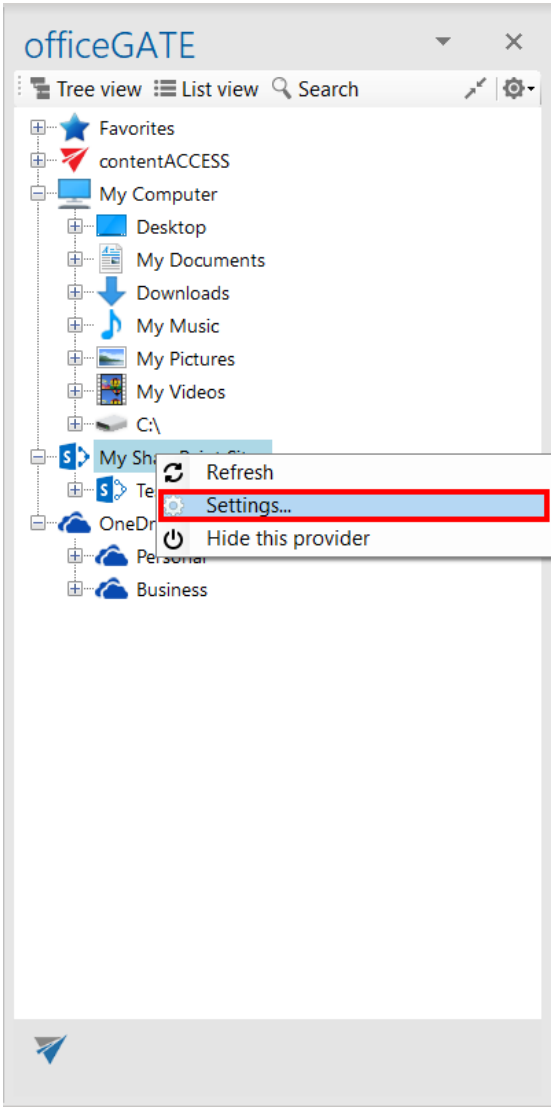
Note: You can hide the providers using the provider's context menu as well. Right click on the provider in the pane and select **Hide this provider** from the context menu items.



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 (1st screenshot below) or b) from the given provider's context menu (2nd screenshot below):





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

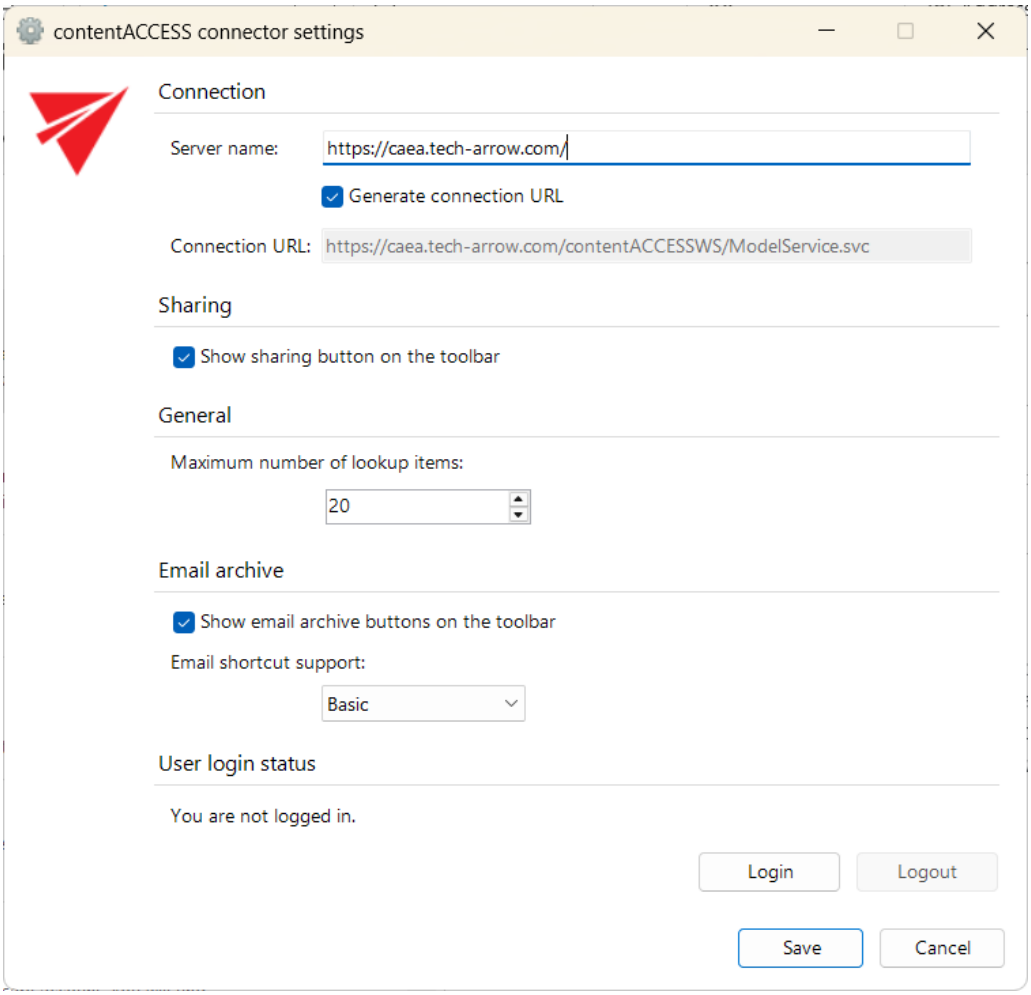
Connecting to contentACCESS

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

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

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

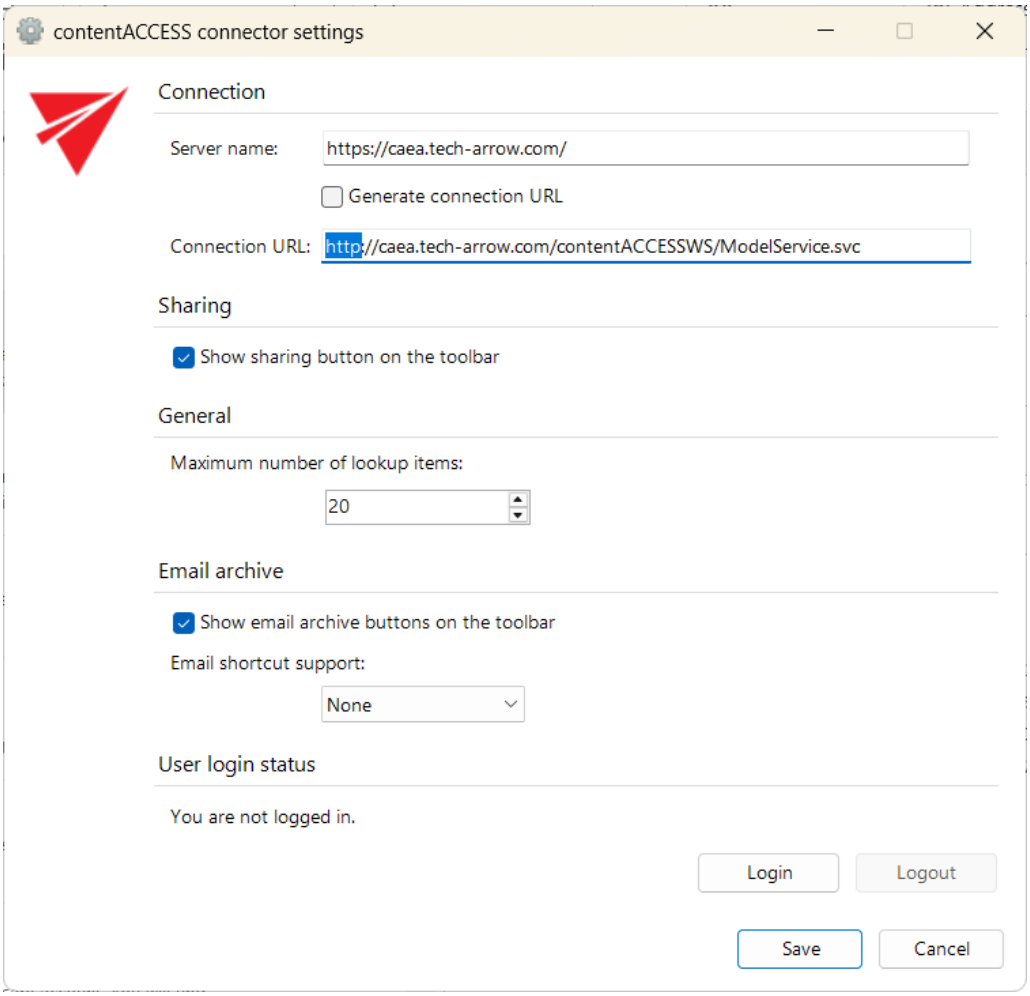
1) **If you use proxy (contentACCESSWS) with secure (HTTPS) connection to connect to contentACCESS, configure the connection as follows:**
   - Check the **Generate connection URL** checkbox;
   - Enter the contentACCESS server name into the **Server name** field; with this action the connection URL will be generated automatically;
   - Specify a maximum 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 here)
   - Choose if you want to have **Email archive buttons** shown on the toolbar.
   - Specify your email shortcut support level: None, Basic, or Full
   - Save your settings.



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: http://**[ServerName]**/contentACCESSWS/ModelService.svc
- Select an authentication type from the **Authentication type** dropdown list; if there were new authentication providers enabled in contentACCESS, but they do not appear in the list, click **Reload** to refresh the dropdown list;

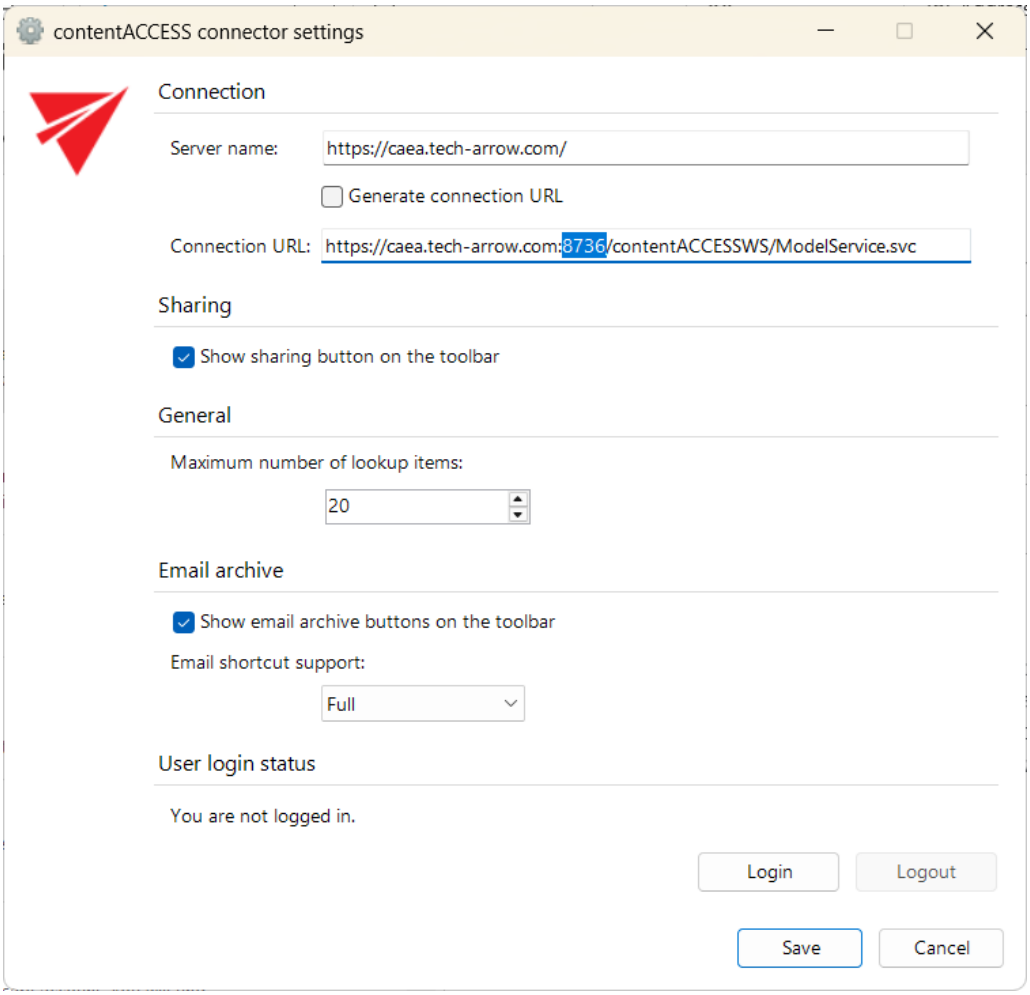
- Enter your **contentACCESS credentials** (Login name and Password);
- Specify a maximum number of lookup items (by default the value is set to 20).
- Specify your default sharing settings (if the Sharing plugin is not licensed in your contentACCESS, you can ignore these settings; more information here)
- Choose if you want to have **Email archive buttons** shown on the toolbar.
- Specify your email shortcut support level: None, Basic, or Full
- Save your settings.



3) **If you use direct connection to connect to contentACCESS (no proxy is installed), configure the connection as follows:**

- Enter the contentACCESS server name into the **Server name** field;

- Enter the connection URL with the correct server name into the **Connection URL** field: http://**[ServerName]**:8736/contentACCESSWS/ModelService.svc
- Select an authentication type from the **Authentication type** dropdown list; if there were new authentication providers enabled in contentACCESS, but they do not appear in the list, click **Reload** to refresh the dropdown list;
- Enter your **contentACCESS credentials** (Login name and Password);
- Specify a maximum 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 here)
- Choose if you want to have **Email archive buttons** shown on the toolbar.
- Specify your email shortcut support level: None, Basic, or Full
- Save your settings.



What is Email shortcut support?

Email shortcut support is a setting that controls how Outlook opens **HTML shortcuts** (links) to emails archived by contentACCESS. When you click on an email shortcut, Outlook forms are used to open the archived emails. If **officeGATE** is installed, Outlook will use it to retrieve the content of an archived item from contentACCESS.

For the best performance, **officeGATE's offline synchronization** feature is recommended. If the (selected) mailbox is synchronized, the email content will be retrieved from officeGATE's offline cache instead of the contentACCESS server.

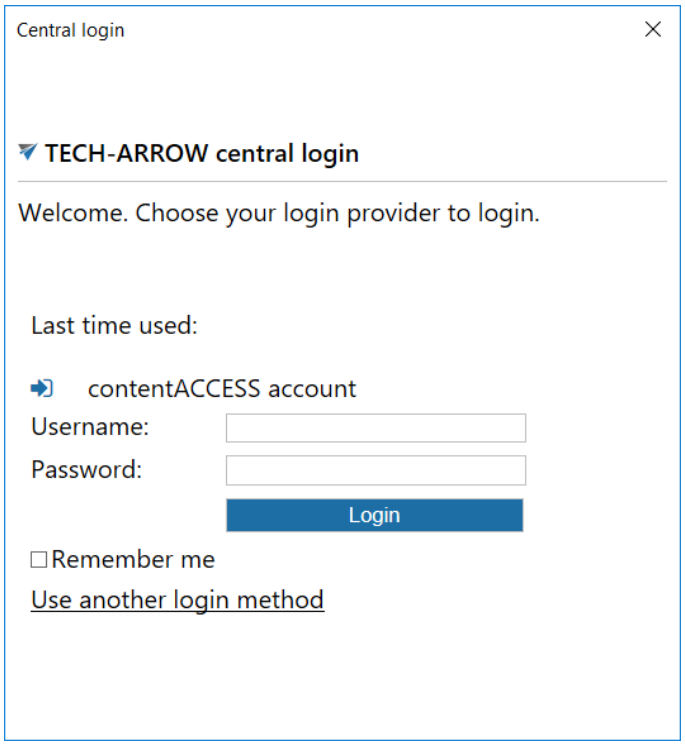
If there are performance complaints when opening HTML shortcuts, this support can be configured or turned off. There are three options:

- **None** – Outlook forms do not cooperate with officeGATE at all

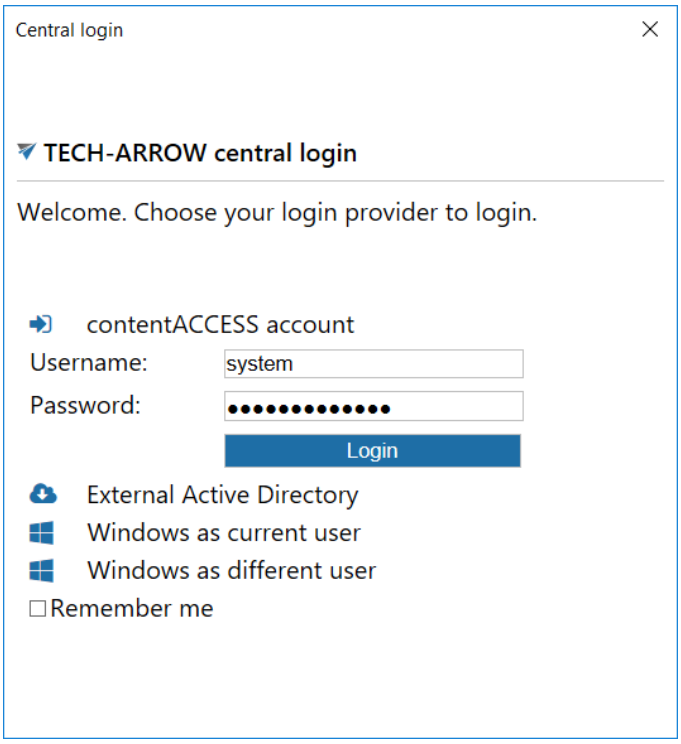
- **Basic** – Outlook forms use officeGATE to retrieve the archived content. The content is saved to your computer and opened from there
- **Full** – Outlook forms use officeGATE to get the archived content and store the email(s) in a hidden folder inside your mailbox. This is slower but makes the email behave like a normal mailbox item, so you can use all Outlook features with it (like reply, forward, search, etc.)

There are two possible ways to log in to contentACCESS:

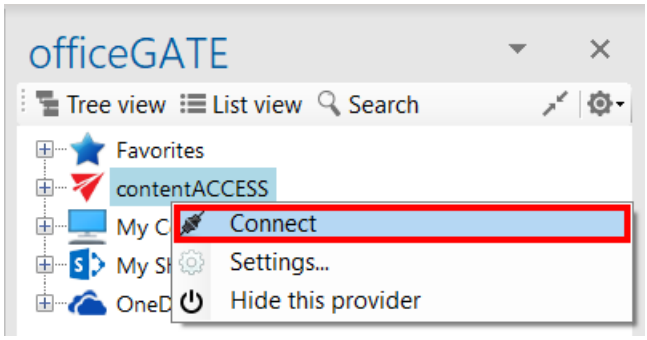
1. After filling in your settings and before saving, click on the **Login button**. A pop-up with **Login providers** will appear. When clicking on Use another login method, all **Login providers,** which are configured in Central administration, will appear.



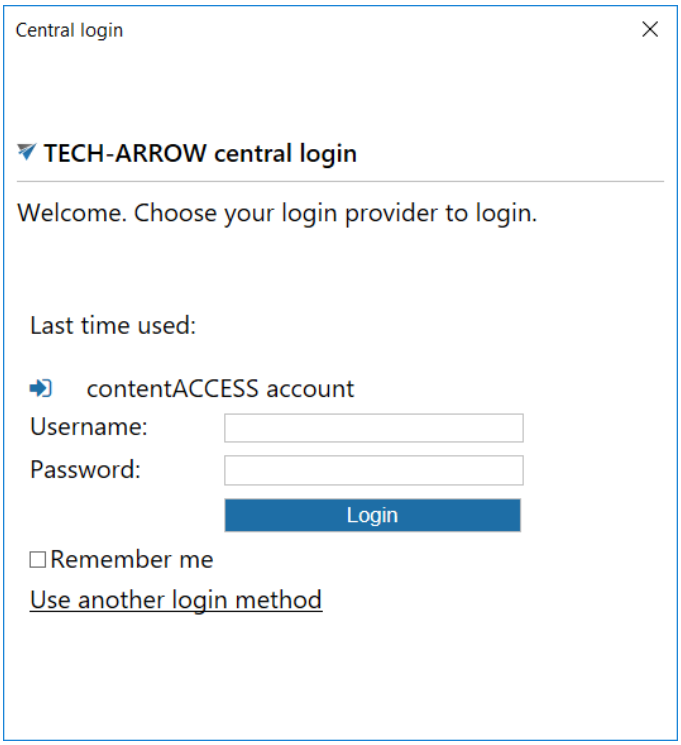
Select the Login provider that you would like to use, enter your credentials and click on the blue Login button. Then, **Save** your settings.



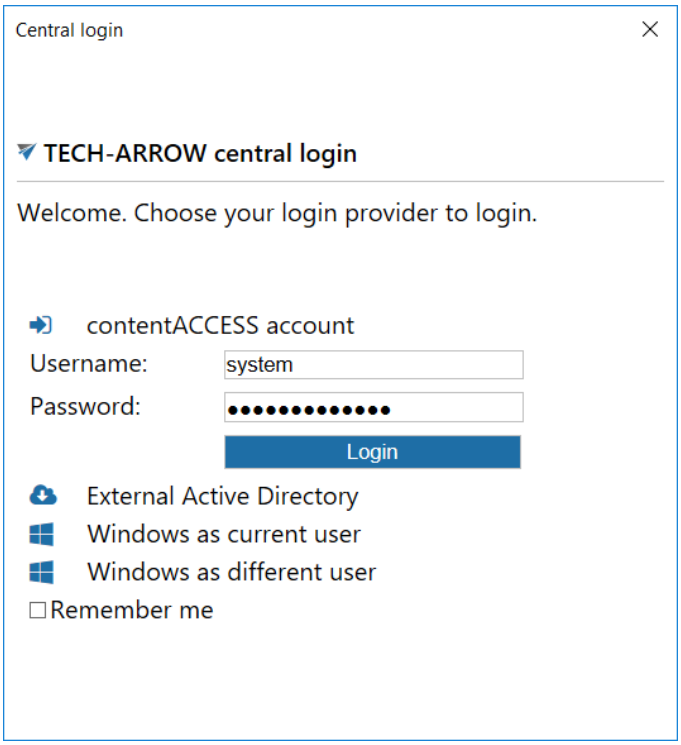
2. After saving your settings, right-click on the **contentACCESS** provider in the officeGATE pane and select **Connect** from its context menu.



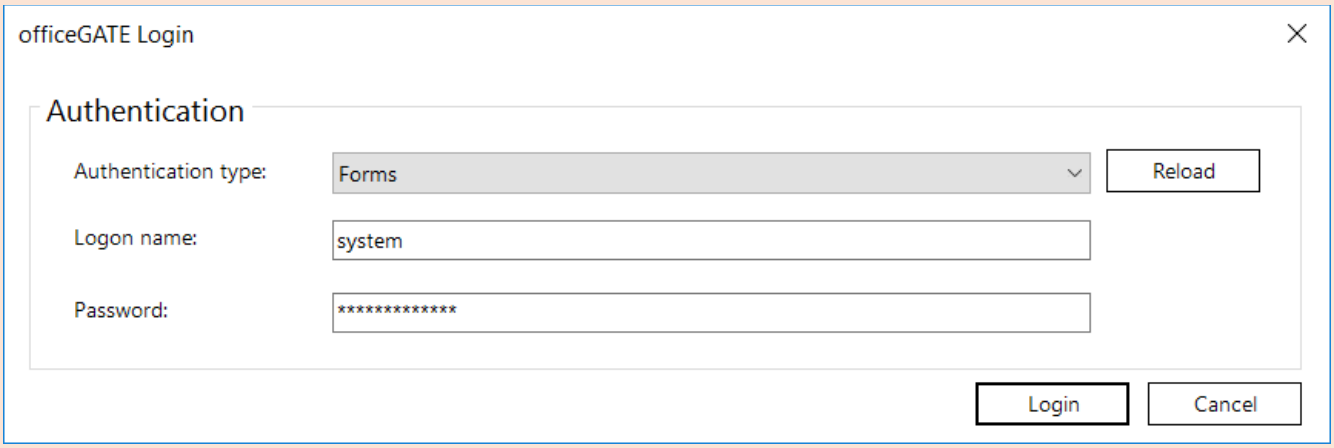
A pop-up with **Login providers** will appear. When clicking on Use another login method, all **Login providers,** which are configured in Central administration, will appear.



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

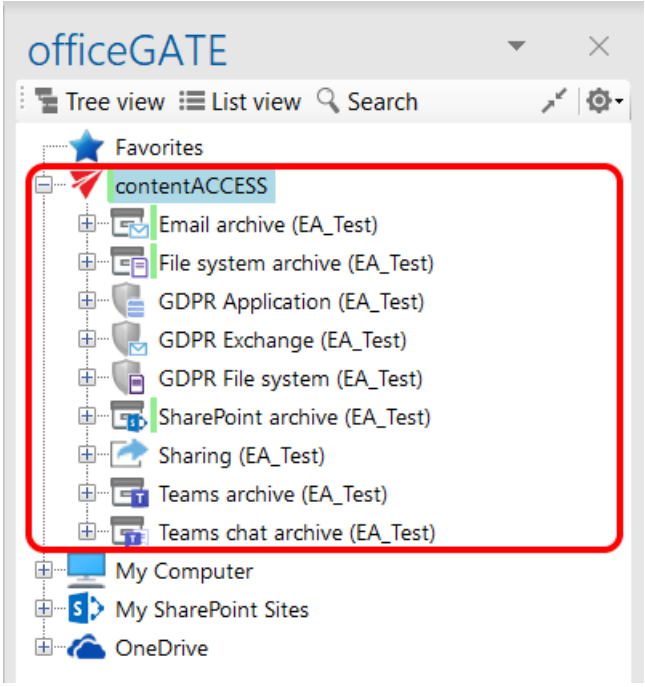


Important: The old login is supported if officeGATE tries to connect to contentACCESS 3.1.76 or less. So lastly released 3.1 with service pack 2 is working with new login. If contentACCESS version is less than 3.1.76, then the old login pop-up will appear when trying to connect to contentACCESS provider:



The **Windows** authentication type for the old login works only with "current user", another user cannot be selected.

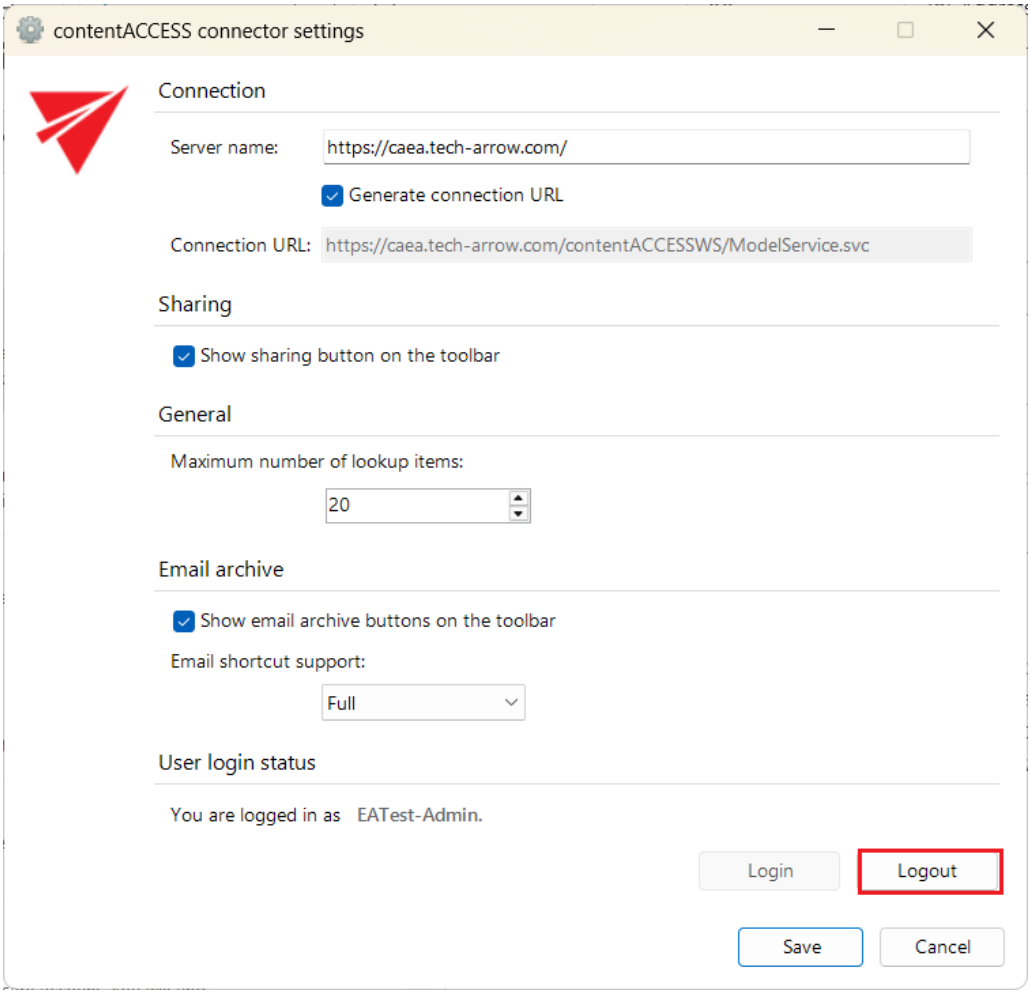
Once the connection is well established, the licensed plugins will be listed when extending the contentACCESS provider's node in the pane.



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

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

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.



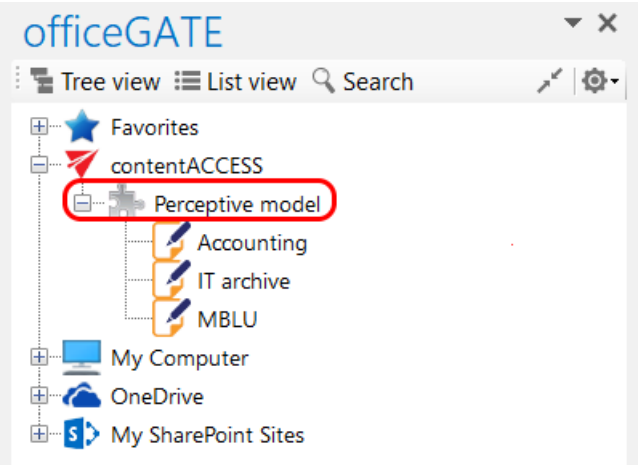
Connecting to third -party DMS providers (Datengut, Perceptive)

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 contentACCESS Manual). 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.

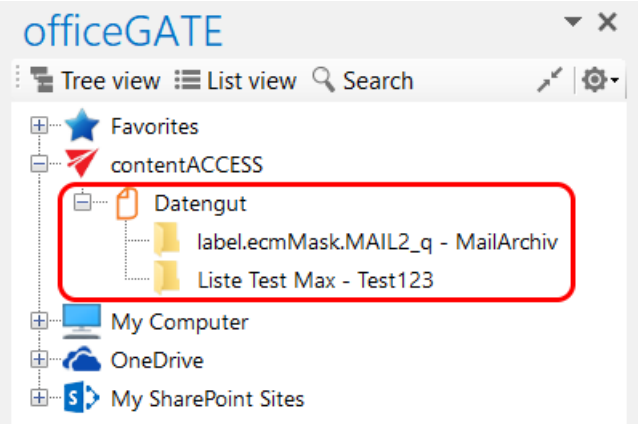
How to connect to the Datengut/Perceptive DMS in officeGATE: First, you need to configure and log in to the contentACCESS provider (read more in this section). When logging in:

- 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

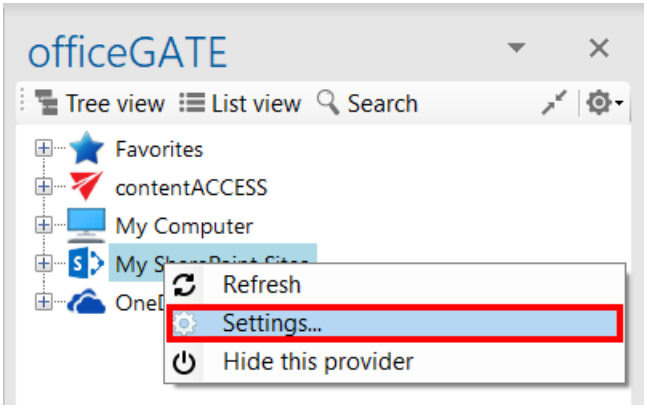
Connecting to SharePoint site(s)

The following SharePoint versions are supported by officeGATE:

- Microsoft 365, SharePoint 2013, SharePoint 2010
- Foundation

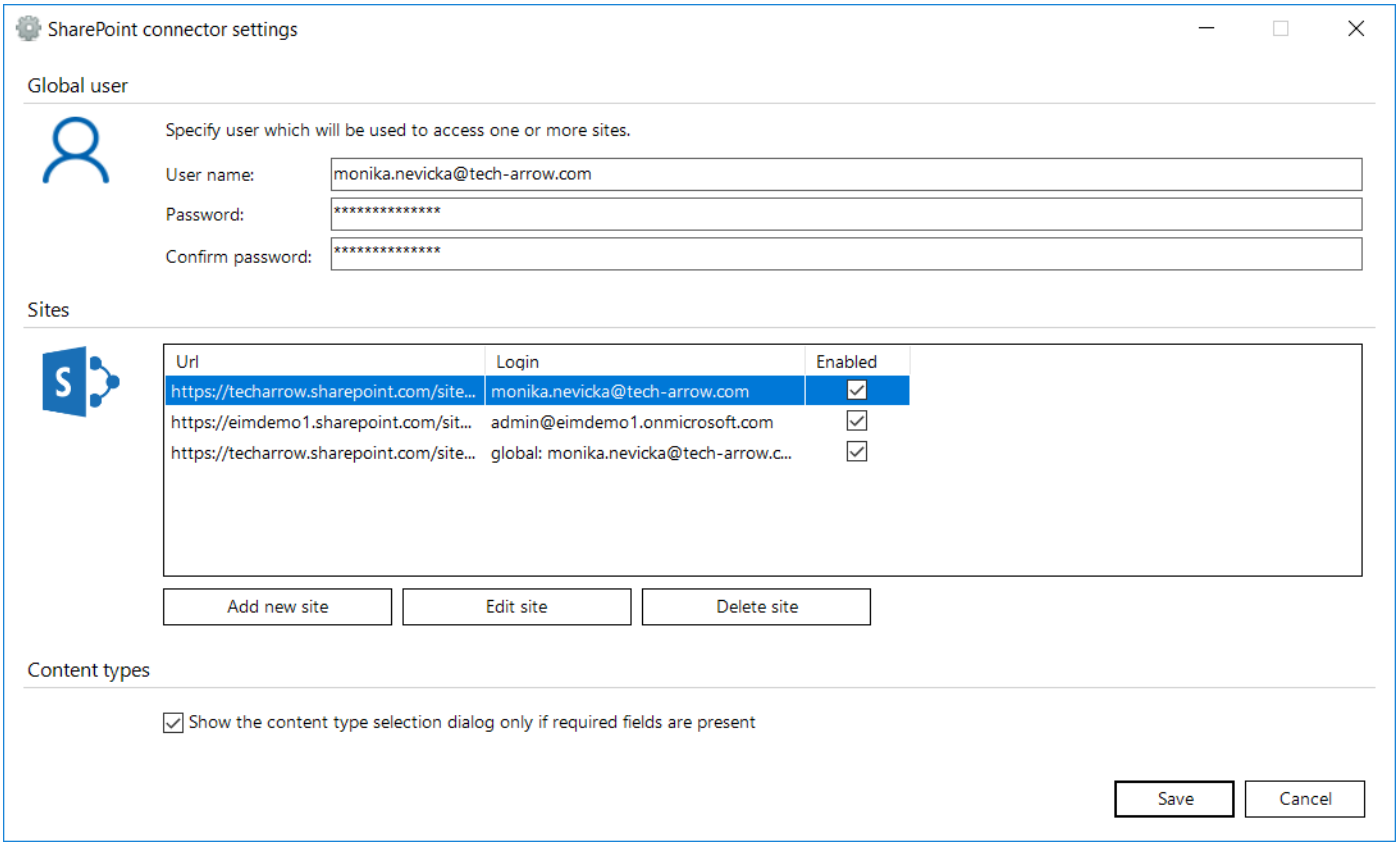
Note: The SharePoint provider does not support login for external users. An external user is someone from outside your Microsoft 365 subscription to whom you have given access to one or more sites, files or folders.

Open the **SharePoint connector settings** dialog with clicking on "**Settings**" in the SharePoint node's context menu (or in **officeGATE settings** dialog → **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.

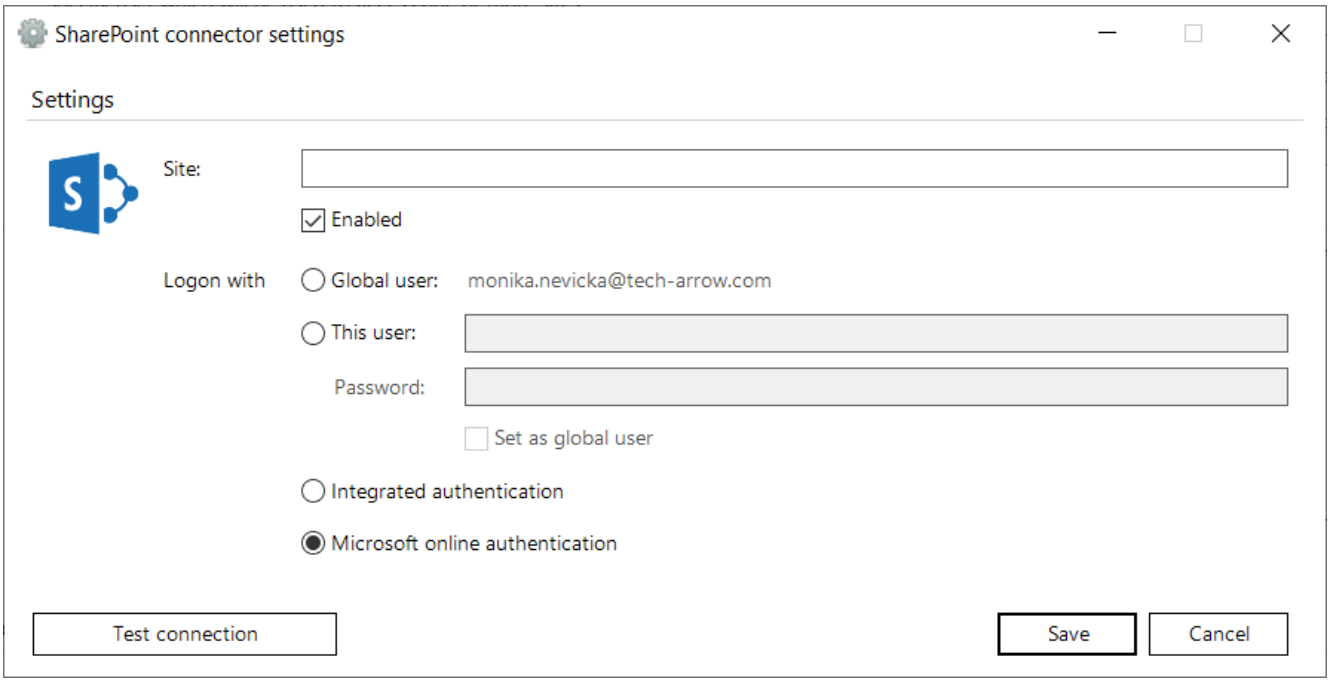
officeGATE supports the connection to multiple SharePoint sites. The already connected sites are listed in the **SharePoint connector settings** dialog. This dialog is empty when connecting to a SharePoint site for the first time. To add a new site to the list, click on "**Add new site**" button.



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 this article.

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



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.

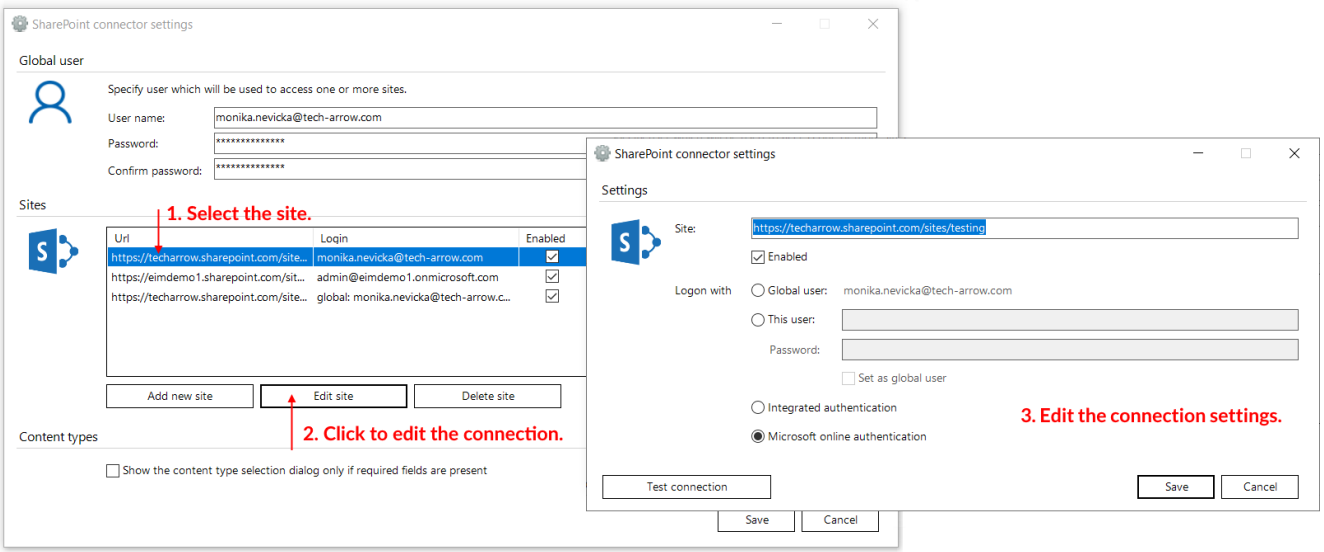
The required data are filled into a show-up dialog when uploading to a SharePoint container. For more information read this chapter.

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

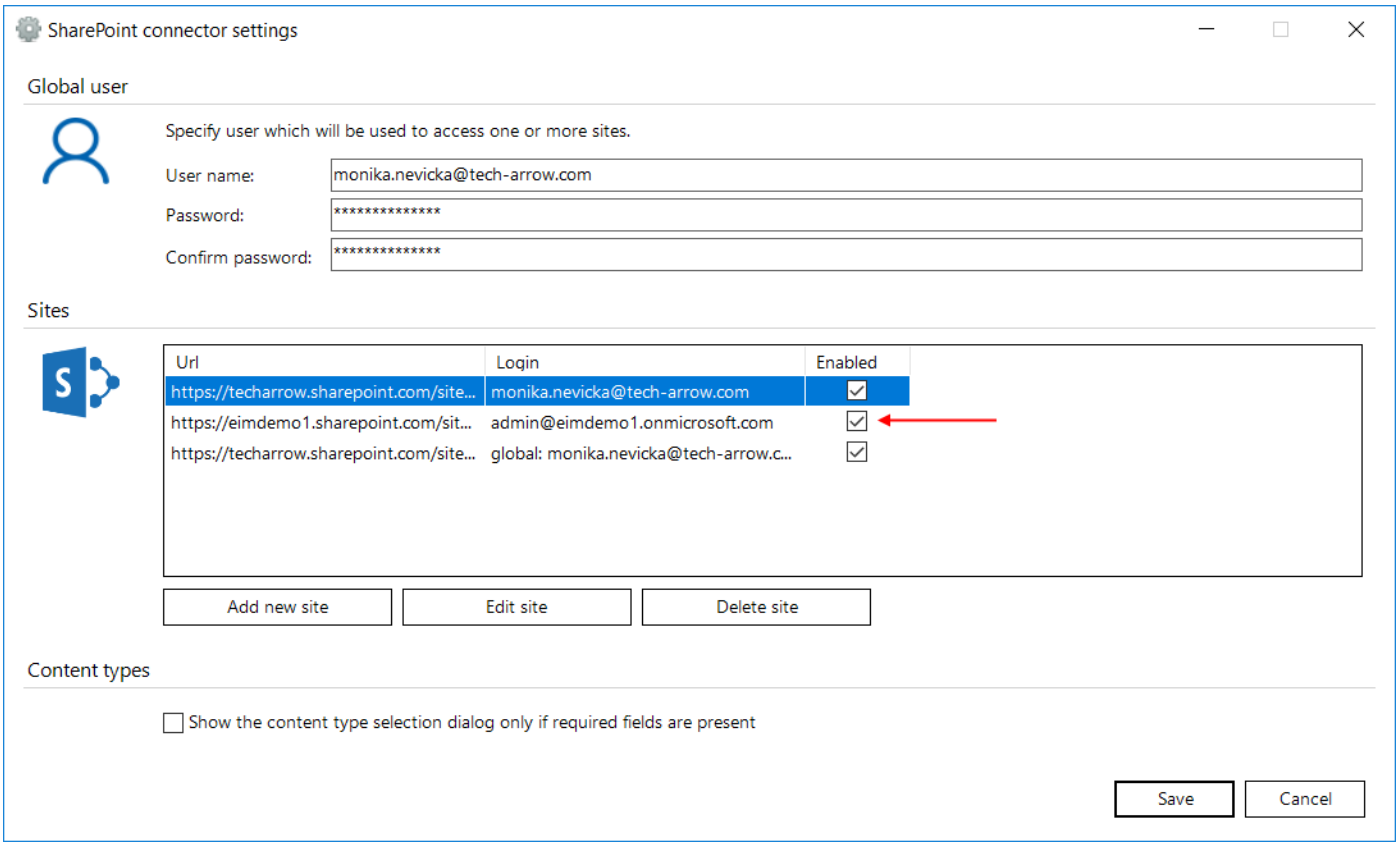
SharePoint settings in officeGATE need to be changed in many cases (due to the change of the password, for example). To change these settings, select the site that you need to edit and click on the "Edit site"

button. The settings dialog of the corresponding site will be opened, where you can change the URL, user or password (Screenshot A).



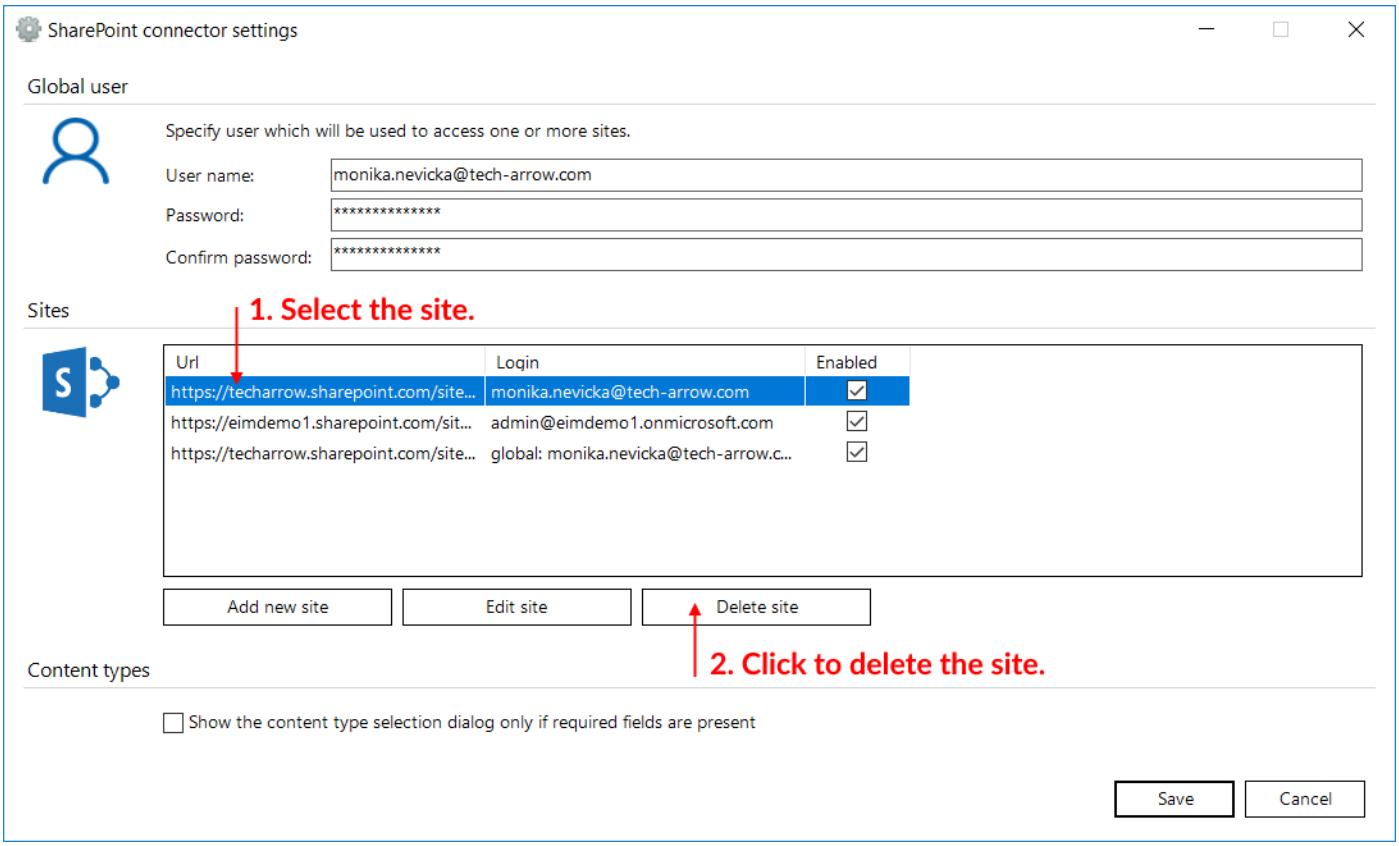
Screenshot A: Editing SharePoint site's settings

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).



Screenshot B: Enabling/disabling SharePoint sites

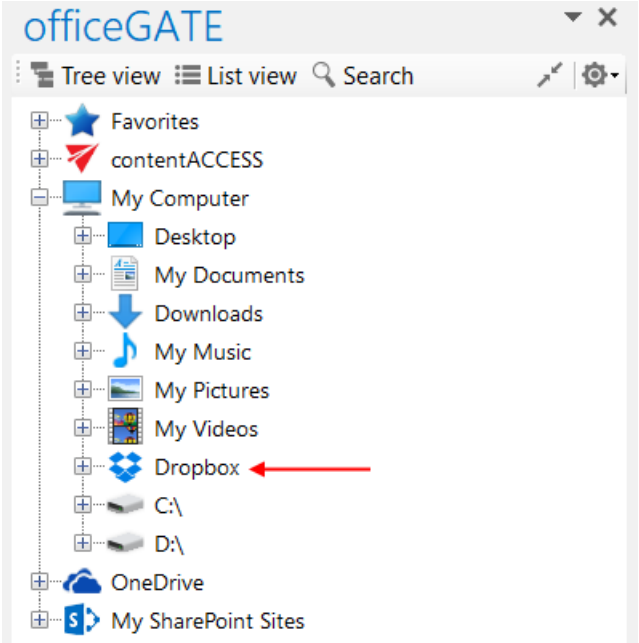
SharePoint sites can be also deleted from the list. To delete a site select it in the list, then click on option “Delete site” in the dialog (Screenshot C). The connection with deleted sites can be newly established with clicking on the “Add new site” button, and specifying the required fields in the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



Screenshot C: Deleting SharePoint sites

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 here 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.

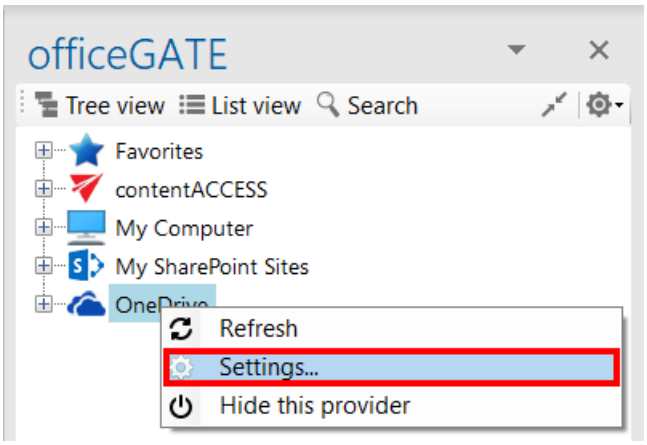
officeGATE is a brilliant tool that integrates OneDrive into your MS Outlook mailbox and ensures a simple and quick access to the documents stored in the OneDrive folders. The OneDrive provider (in the officeGATE pane) connects the user both to his personal and business account using 2 subnodes:

- **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)

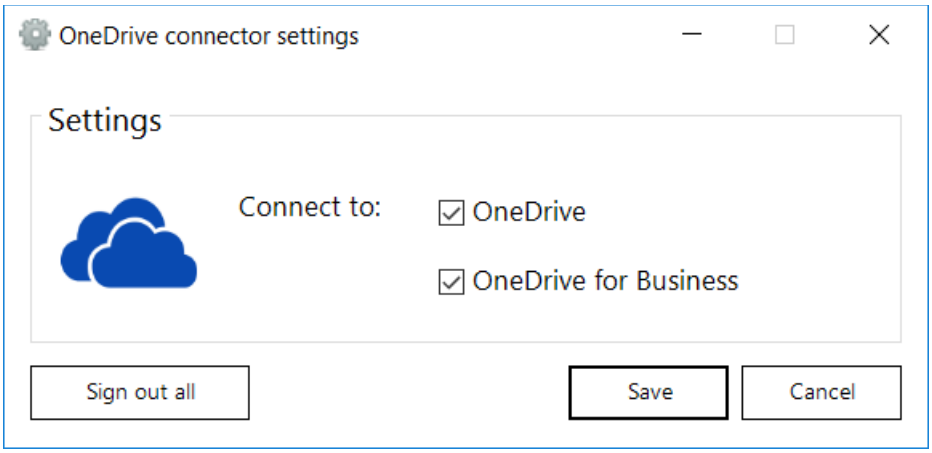
If you have installed OneDrive on your computer, the files will be available locally under the **My Computer** node, too.

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.

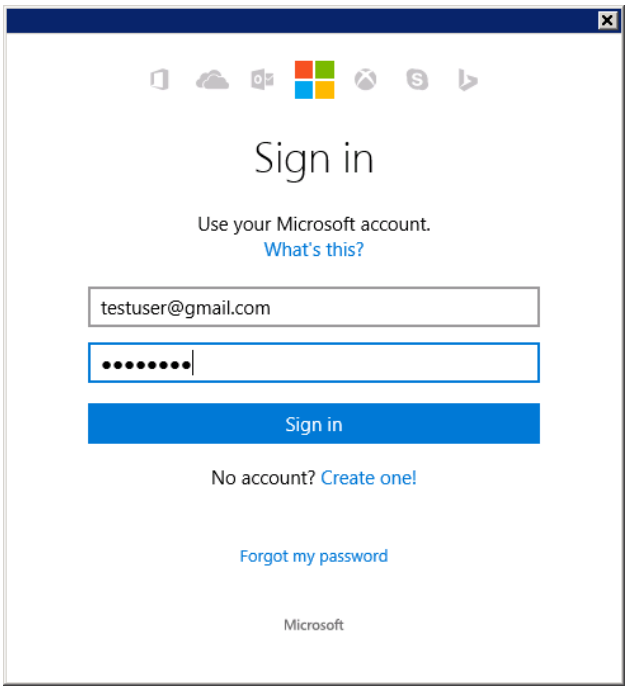
Click on "**Settings**" (either using the node's context menu or from **officeGATE Settings → Providers** tab):



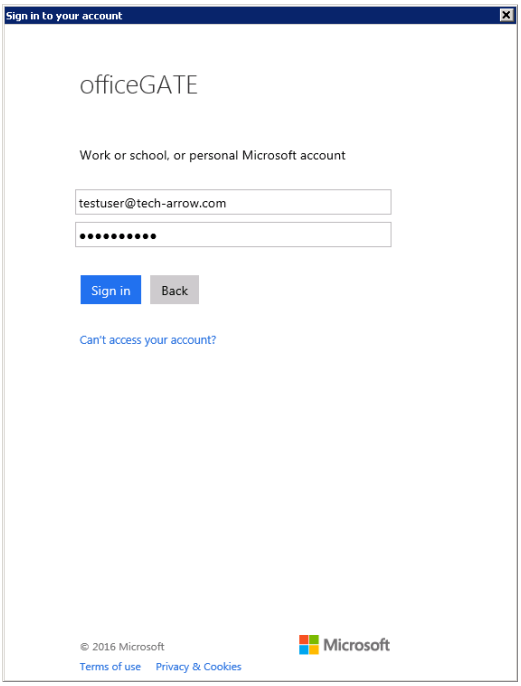
The following dialog pops up. Check the checkbox(es) that you want to connect to and click "Save".



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":

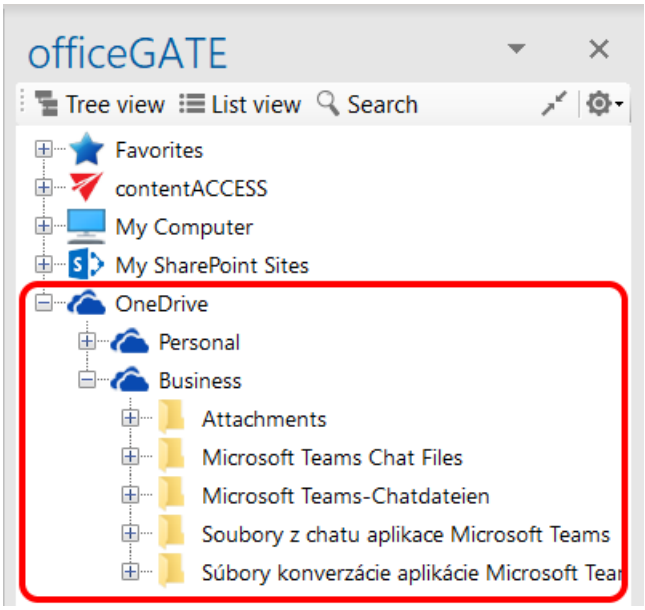


Signing into **OneDrive** with personal account

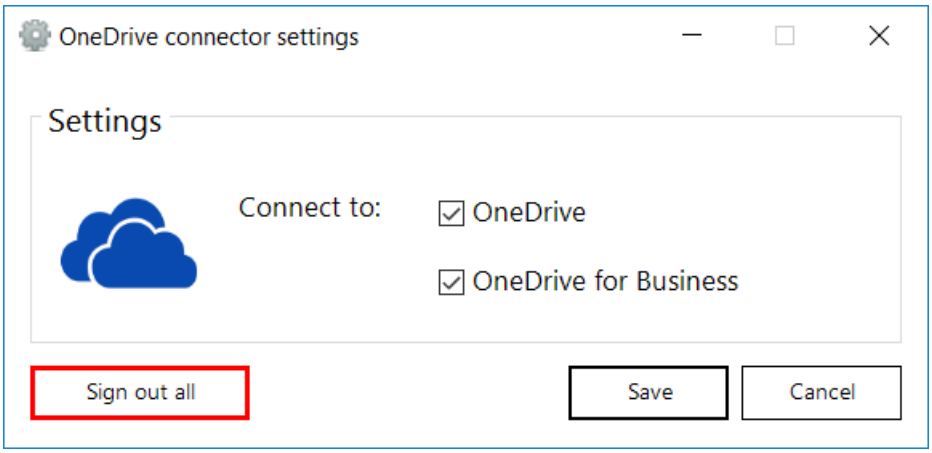


Signing into **OneDrive for business** using business account

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



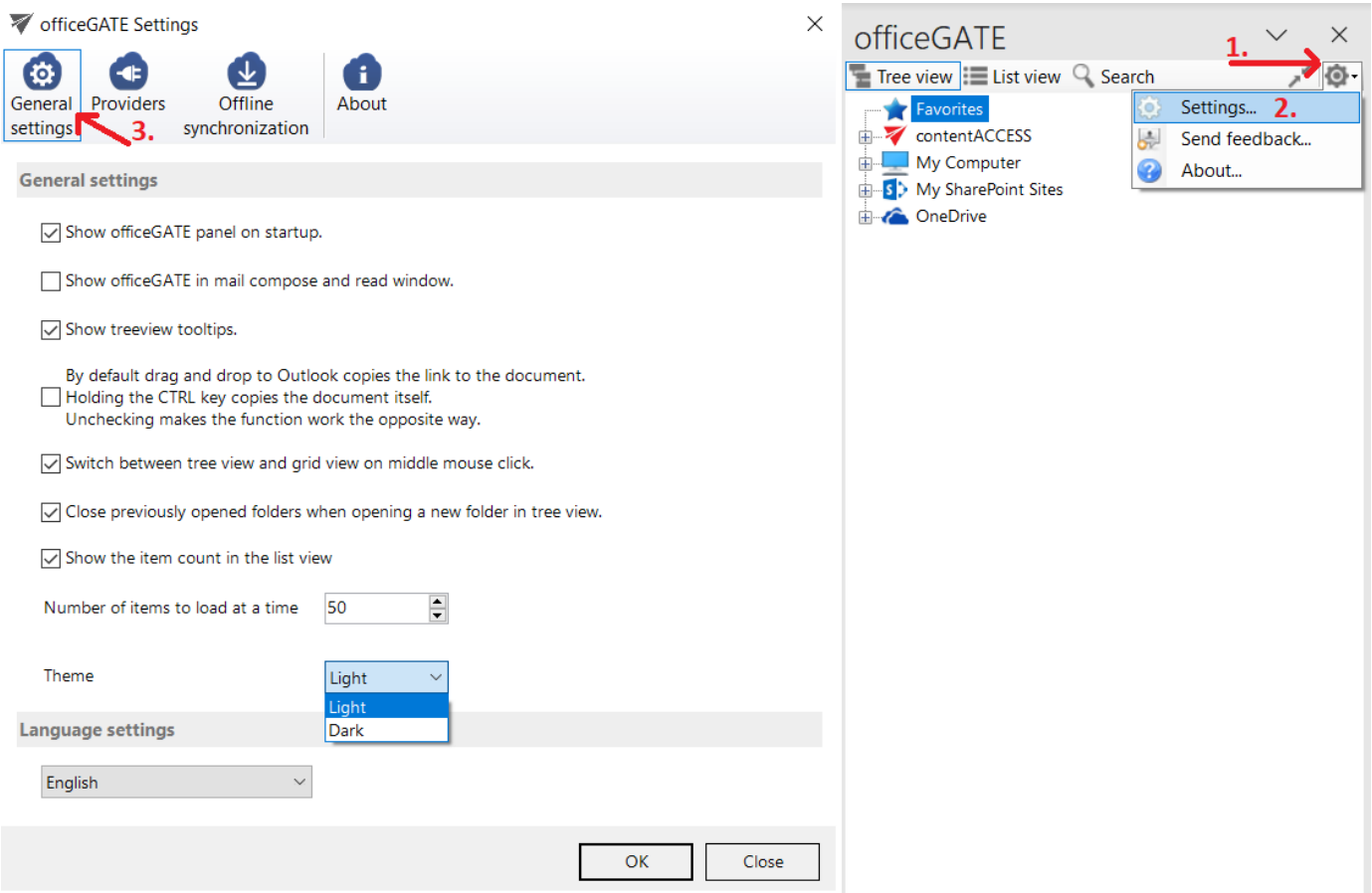
Wish you sign in with a different user account, open the settings window and click “Sign out all“ and sign in again with another credentials.



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 → General settings**.

Click on the 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:



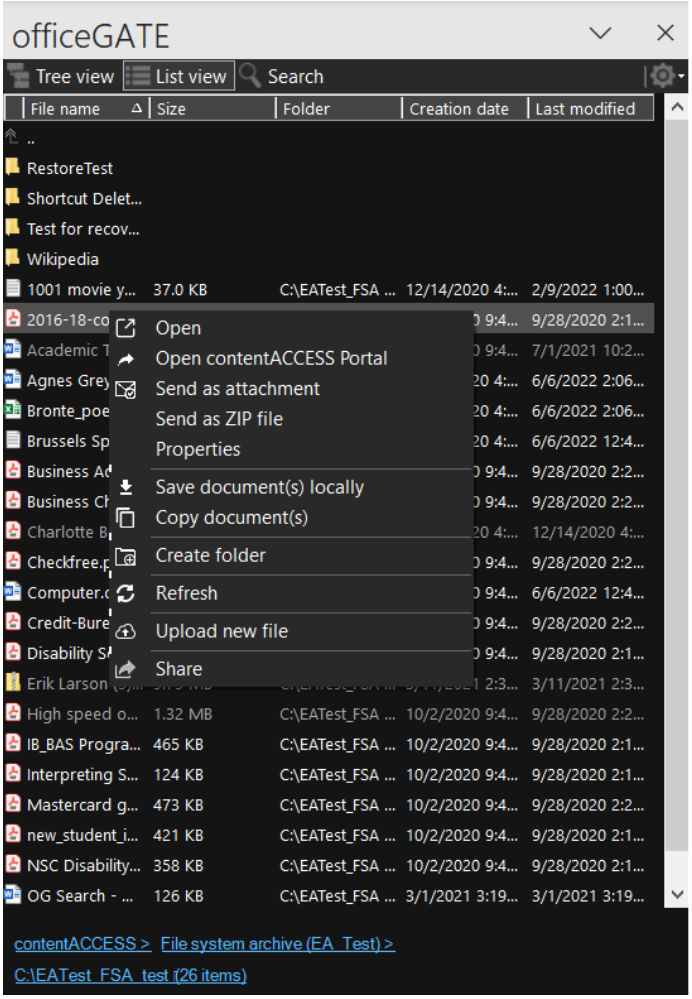
- **Show officeGATE panel on startup**: If this option is selected, the officeGATE pane will be displayed automatically when opening your Outlook. Otherwise the officeGATE pane will be hidden and you need to click on the officeGATE button ( ) to show it. (For more information see the section Launching 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 (4th) option on the **General settings** page is turned on. Unchecking makes the function work the opposite way.

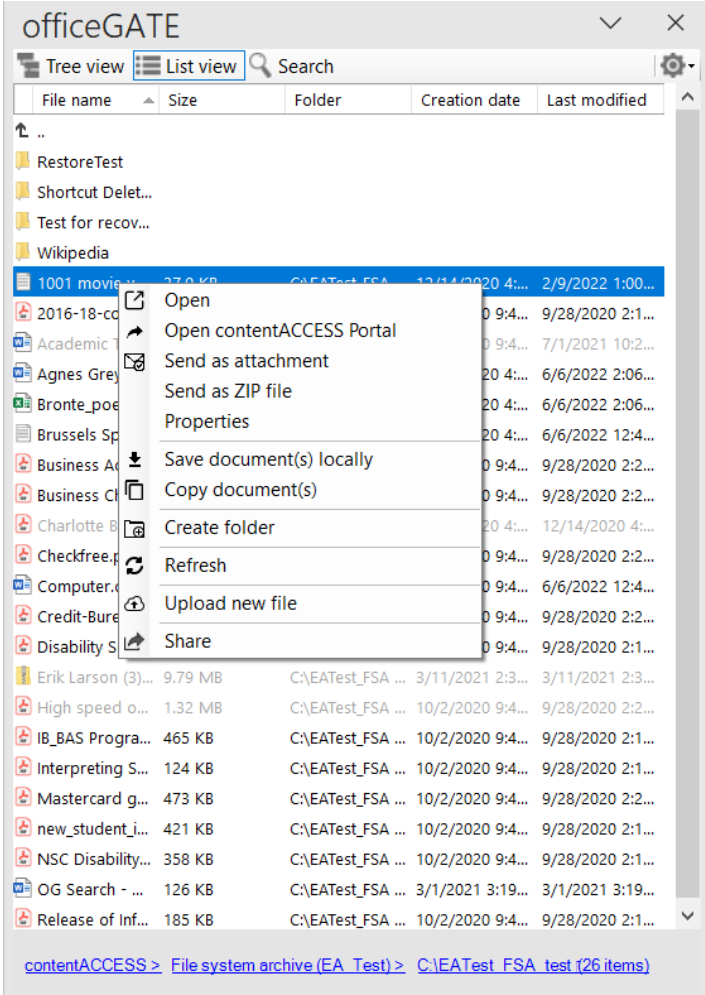
- In **General settings** you can also enable the middle mouse-click, which allows to switch between tree view and list view with clicking the middle-mouse button. For more information about these views check section [View selection: Tree view, List view, Collapse all](#).

- 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**.

- **Theme** - the light and dark mode is supported in officeGATE, which provides a white or black background for the application. The light/dark mode is enabled by default when you select the "Light" or "Dark" options from the dropdown menu and click on the OK button.





- **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 – for example - English, German, Norwegian or Chinese (simplified) language from the dropdown list.

  There is also an option to take **Outlook language** by selecting **Auto detect** from the dropdown menu. In this case, if the user changes the language of Outlook, officeGATE will automatically switch to that language. If such language is not present in officeGATE, then it falls back to English.

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.

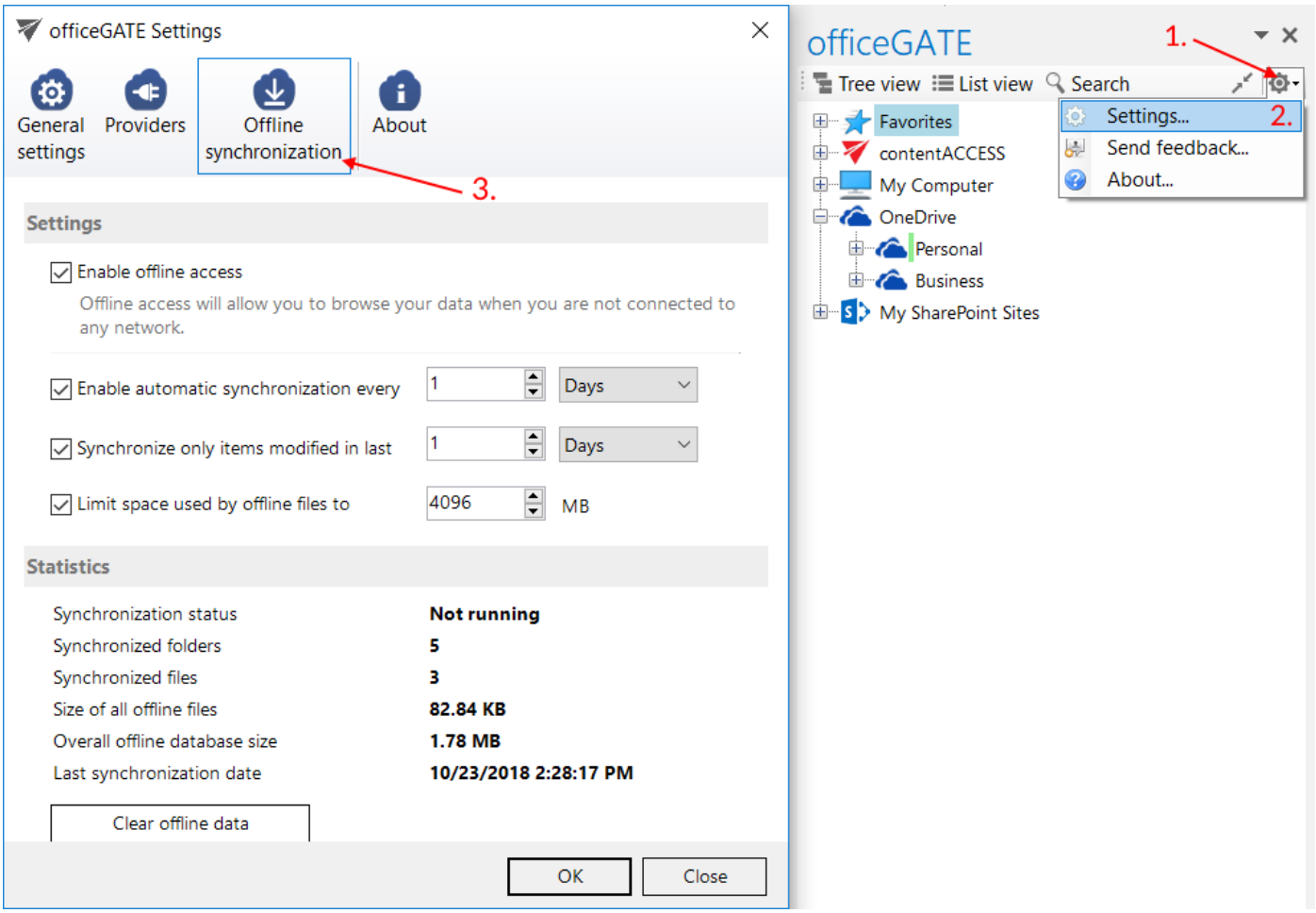
If you want to work with your files offline, you need to:

1. enable offline access in the officeGATE Offline synchronization settings
2. 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 mark in the officeGATE's panes header bar, choose **Settings…** and switch to "**Offline synchronization**" like on the picture below:



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

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

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

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

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

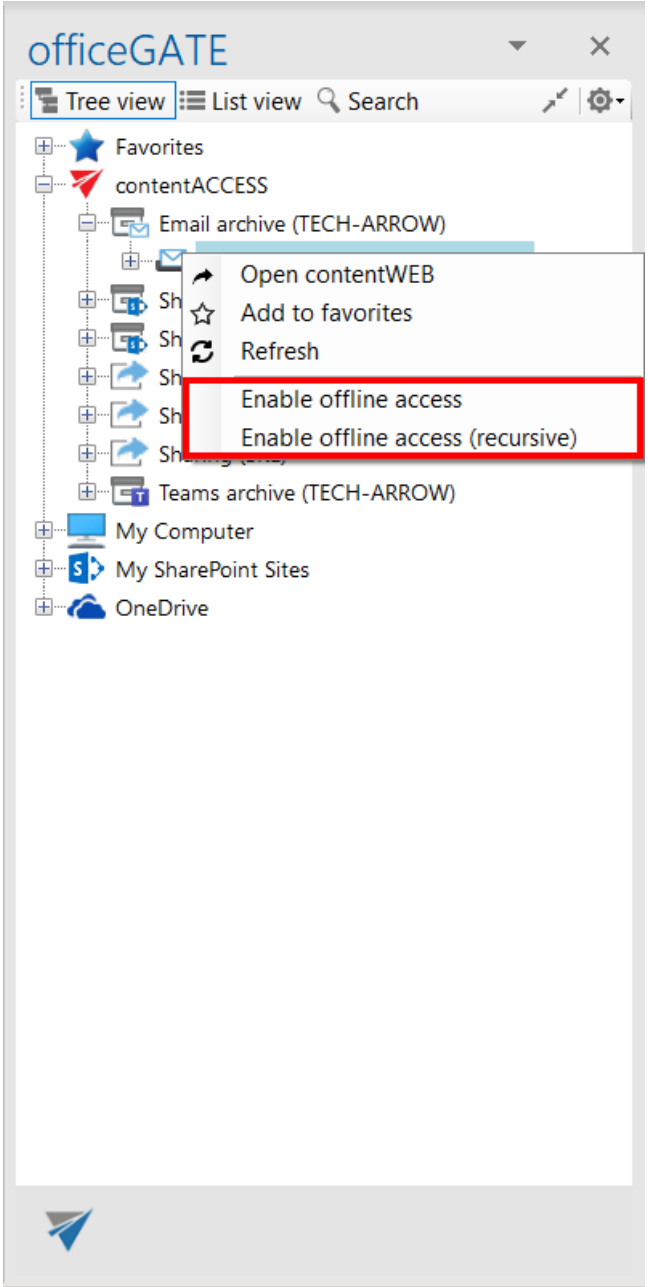
Once the offline access is enabled, you can select the desired libraries/folders/files in the officeGATE pane to be accessed in offline mode.

Selecting items for offline access

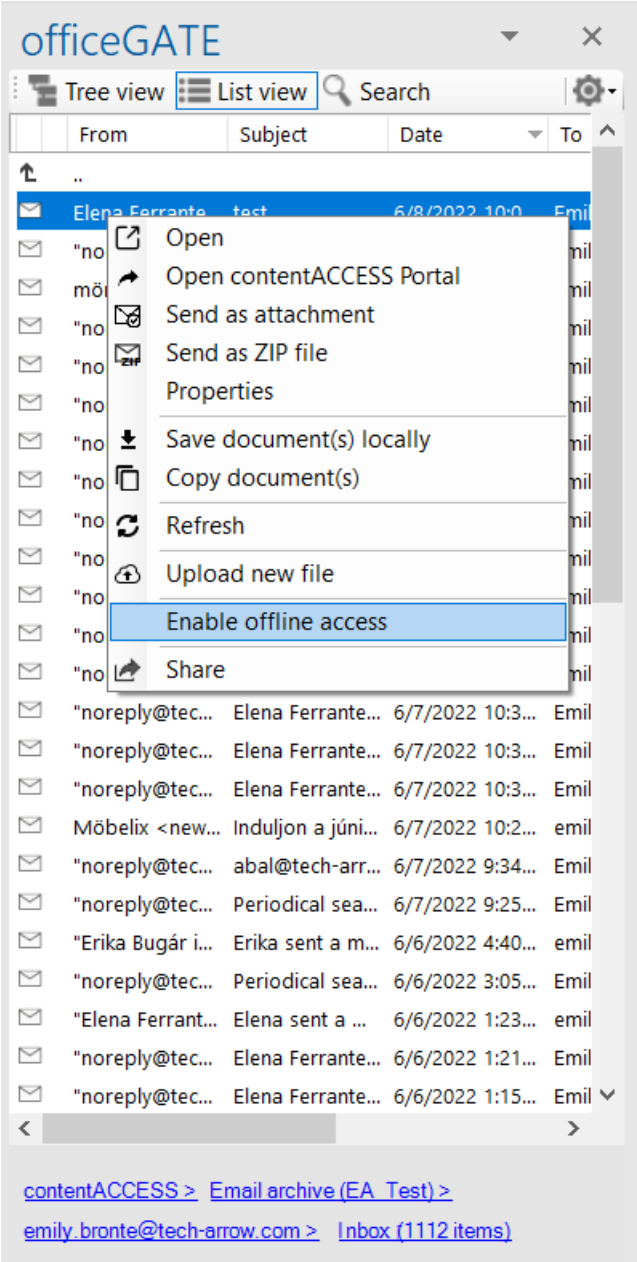
If offline access is enabled in the **Offline synchronization** settings, you can select the desired libraries, folders and/or files to be accessed without network connection and download them to the offline database. These settings are available using the respective item's context menu. Select the respective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

In case of folders and libraries you can enable offline access

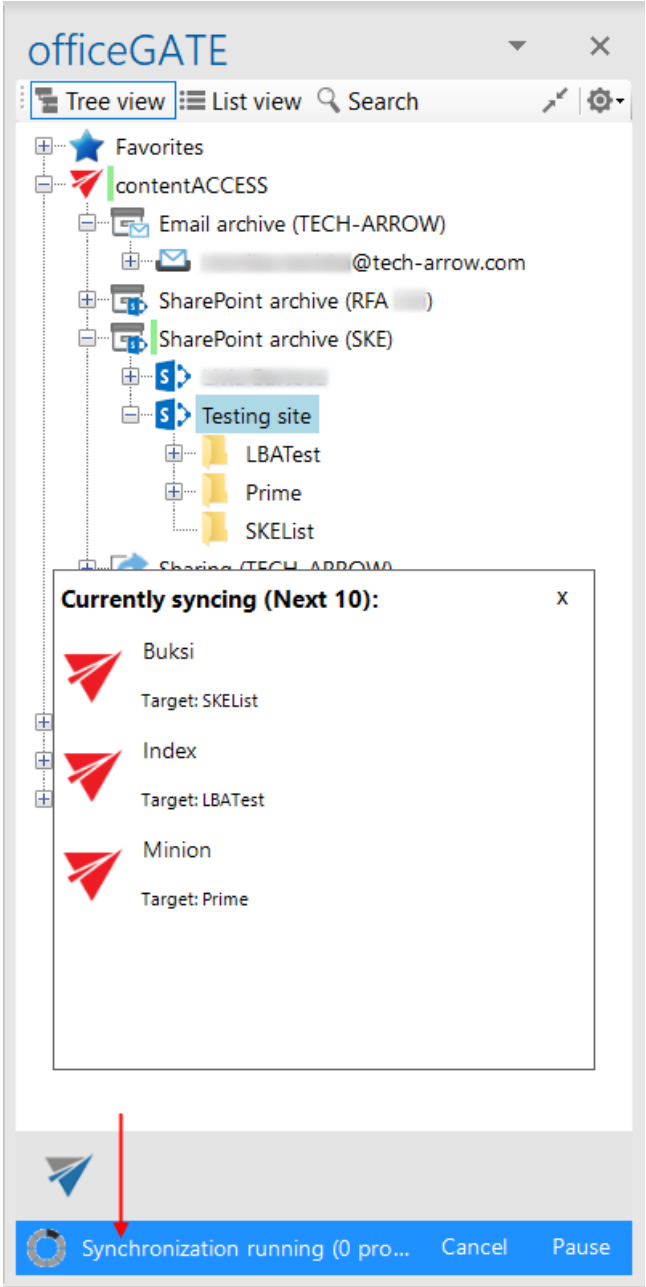
- for the selected node (file container) only – menu item "**Enable offline access**", or
- for the recursive folder structure (i.e. including all its child folders or libraries) – menu item "**Enable offline access (recursive)".**



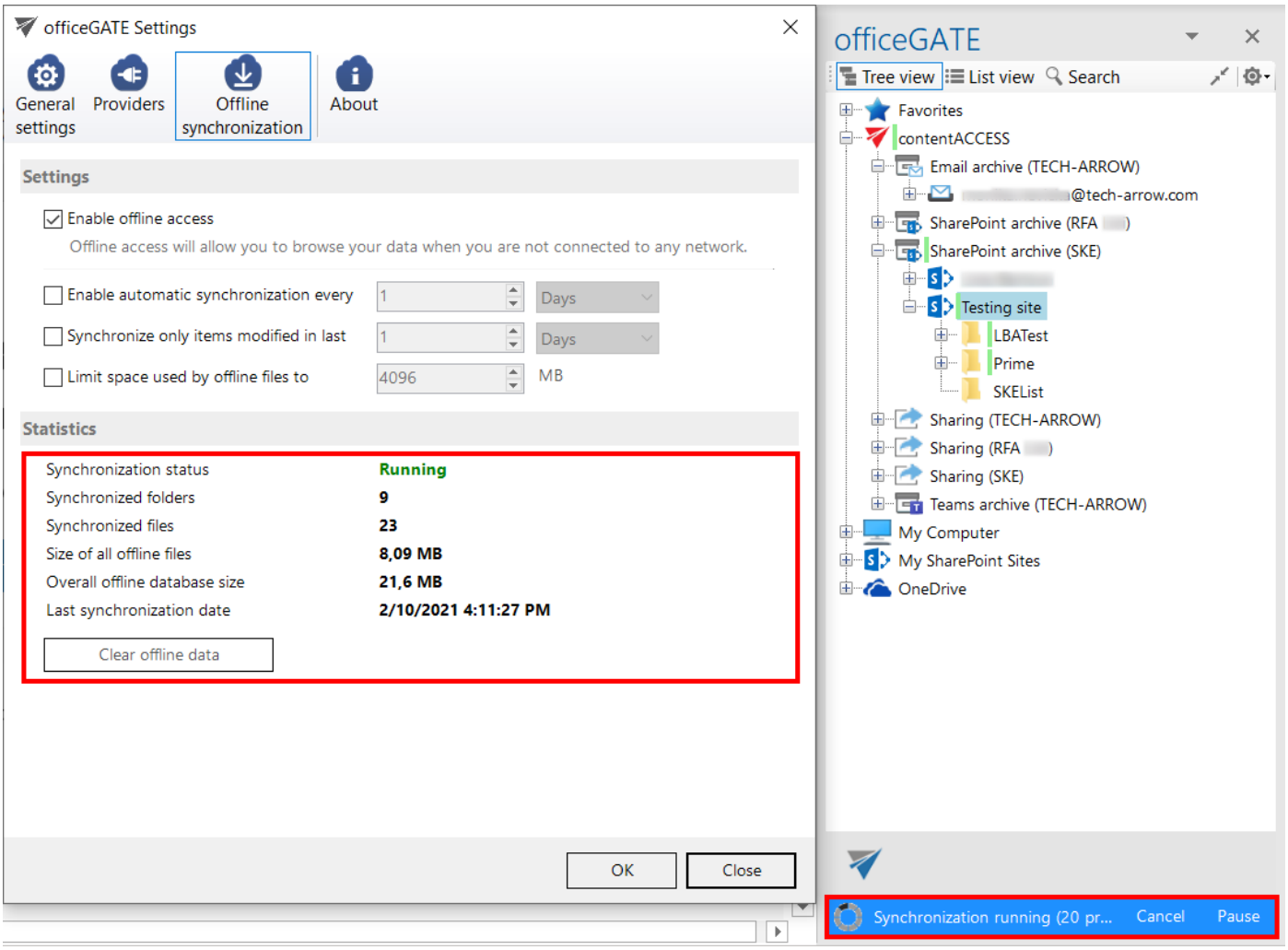
To turn on offline access for a selected file only, locate it in the navigation pane (in list view), open its context menu and select item "**Enable offline access**":



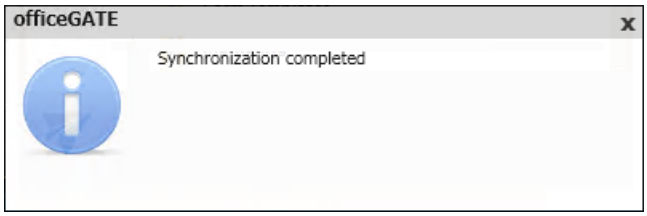
Now we will enable offline access (recursive) for our archived SharePoint site called "**Testing site**". By clicking the option, the synchronization process, i.e., downloading the items to the offline database is started, it can be seen in the footer part of the navigation pane. The documents, that 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:



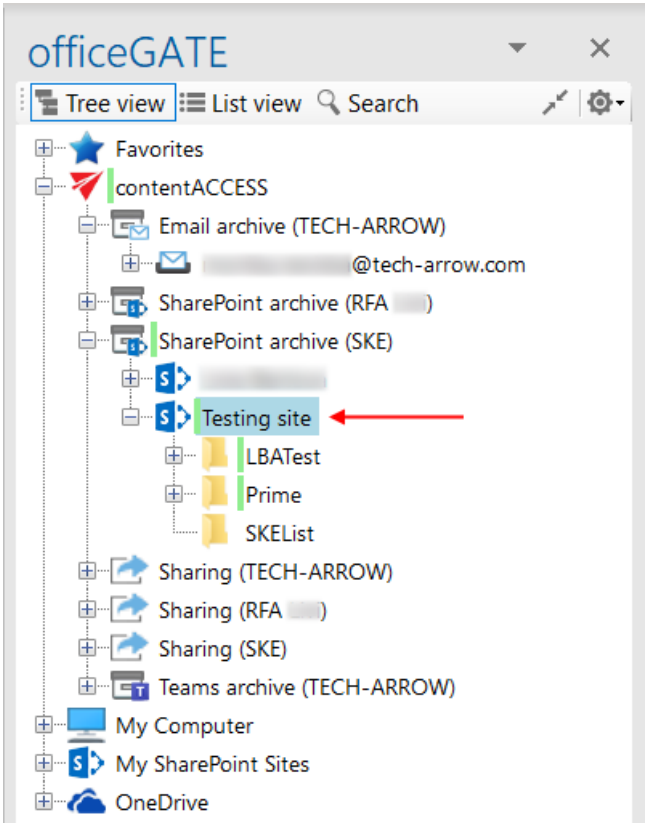
The status of the synchronization process can be checked in the **Offline synchronization** settings:

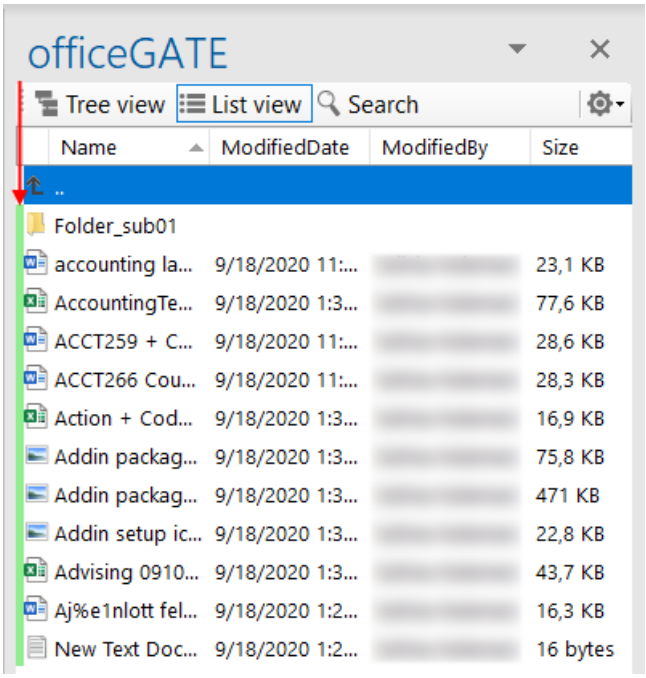


A little pop-up dialog informs the user when the synchronization is completed:



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

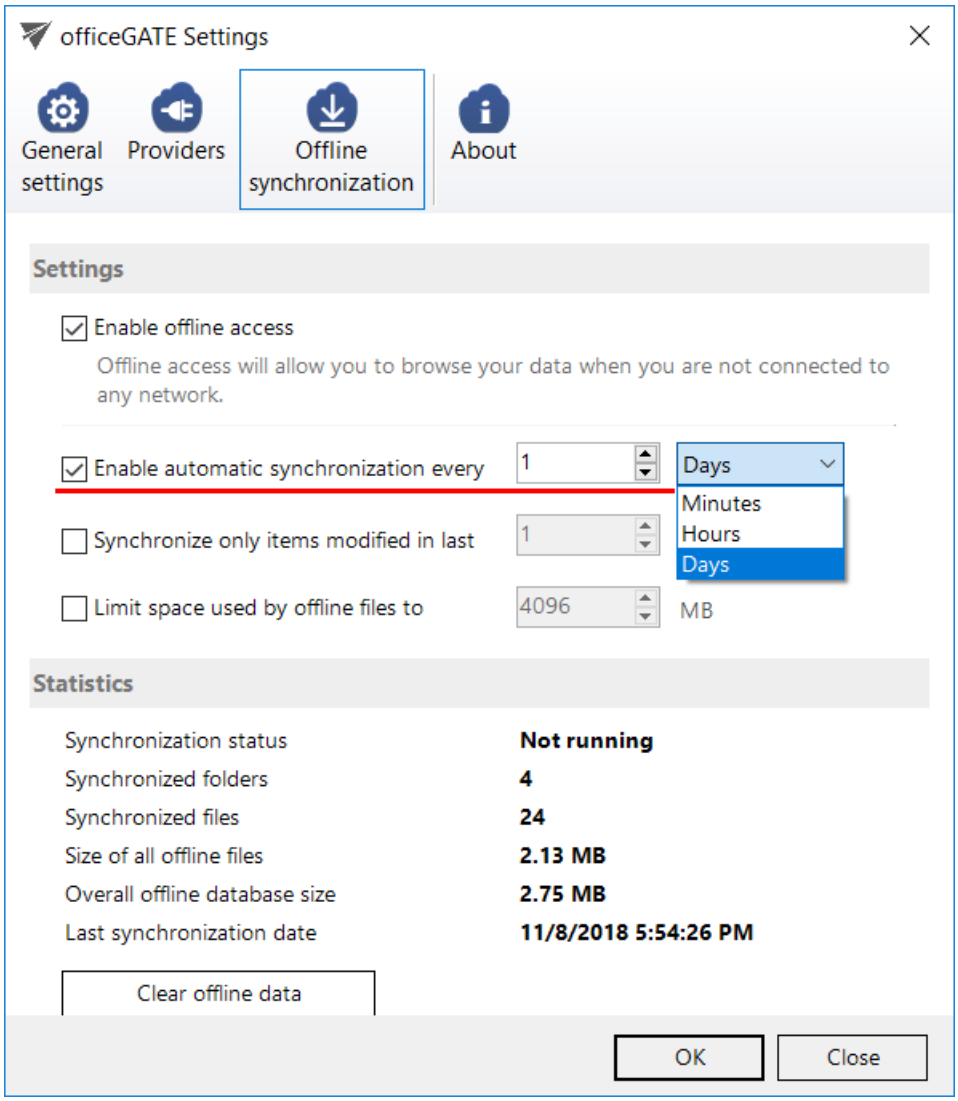

officeGATE
Tree view
List view
Search
Favorites
contentACCESS
Email archive (TECH-ARROW)
@tech-arrow.com
SharePoint archive (RFA)
SharePoint archive (SKE)
Testing site
LBATest
Prime
SKEList
Sharing (TECH-ARROW)
Sharing (RFA)
Sharing (SKE)
Teams archive (TECH-ARROW)
My Computer
My SharePoint Sites
OneDrive


officeGATE
Tree view
List view
Search
Name
ModifiedDate
ModifiedBy
Size
..
Folder_sub01
accounting la... 9/18/2020 11:... 23,1 KB
AccountingTe... 9/18/2020 1:3... 77,6 KB
ACCT259 + C... 9/18/2020 11:... 28,6 KB
ACCT266 Cou... 9/18/2020 11:... 28,3 KB
Action + Cod... 9/18/2020 1:3... 16,9 KB
Addin packag... 9/18/2020 1:3... 75,8 KB
Addin packag... 9/18/2020 1:3... 471 KB
Addin setup ic... 9/18/2020 1:3... 22,8 KB
Advising 0910... 9/18/2020 1:3... 43,7 KB
Aj%e1nlott fel... 9/18/2020 1:2... 16,3 KB
New Text Doc... 9/18/2020 1:2... 16 bytes

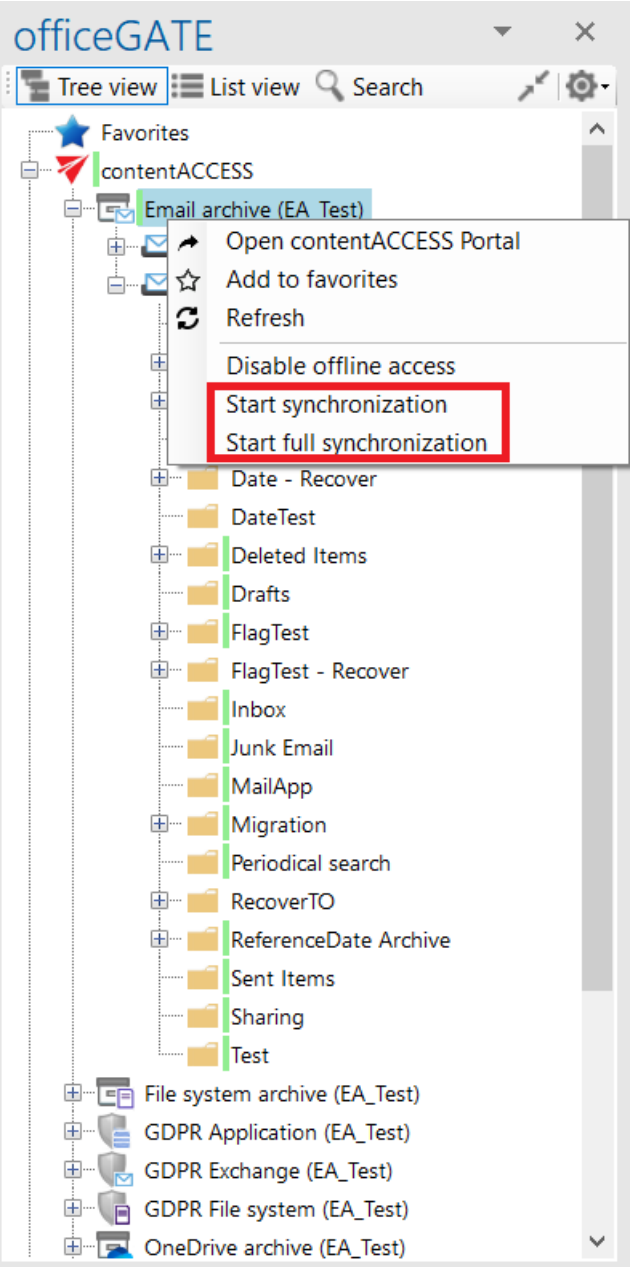
Updating the offline items based on the online changes

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.



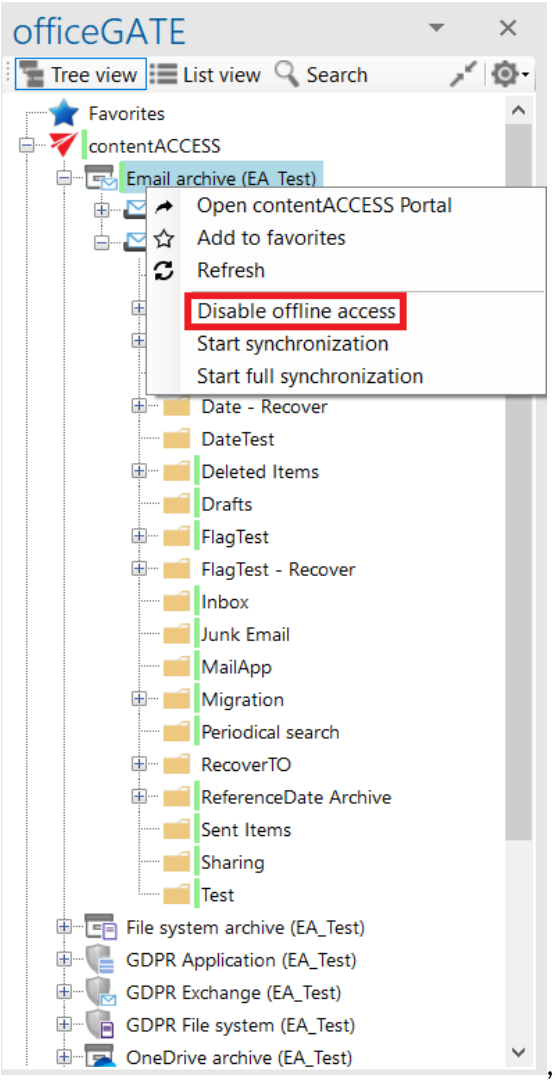
- manually using the **"Start synchronization"** (updates offline files/folders based on the online changes) and/or **"Start full synchronization"** context menu options (downloads everything from scratch) for offline access.



Disabling offline access

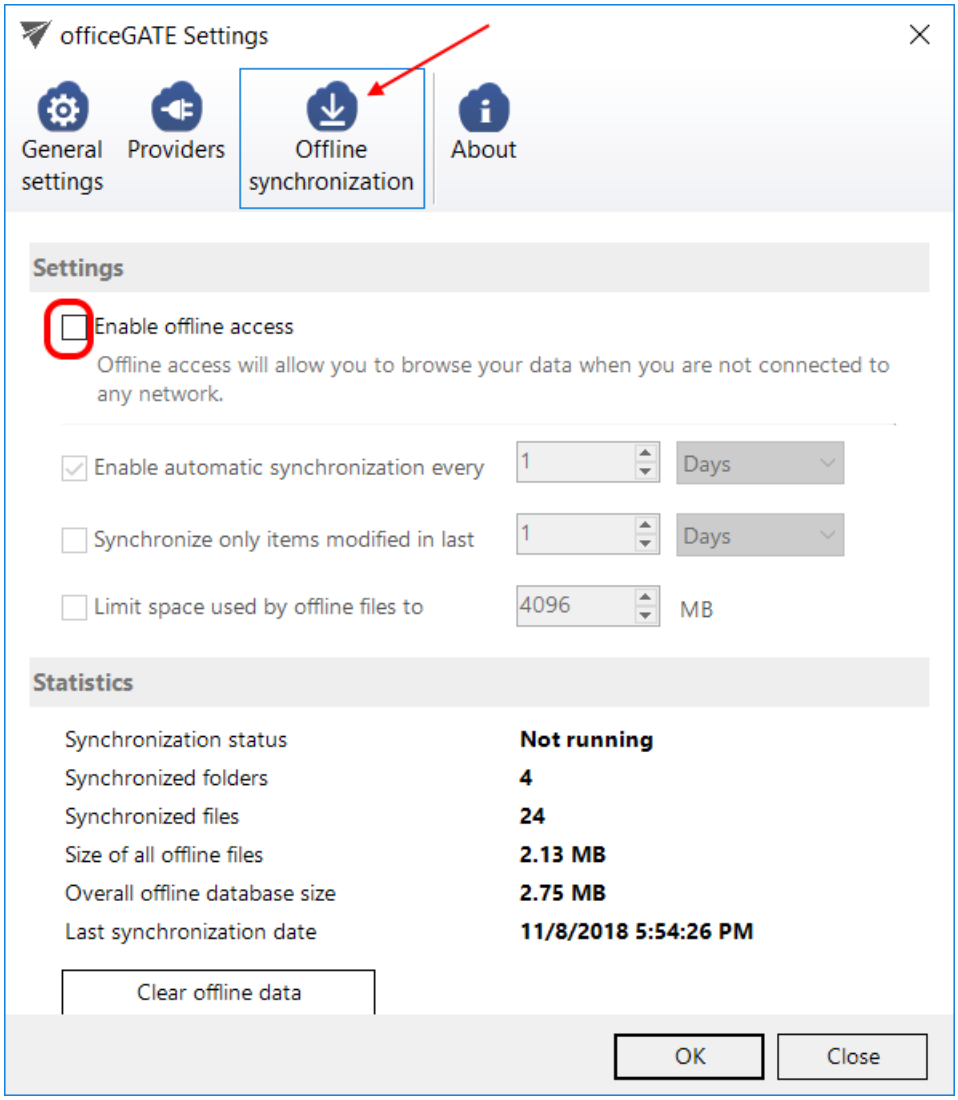
Offline file access can be

- **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.



,2

Screenshot A



Screenshot B

Interrupted manual and automated synchronizations

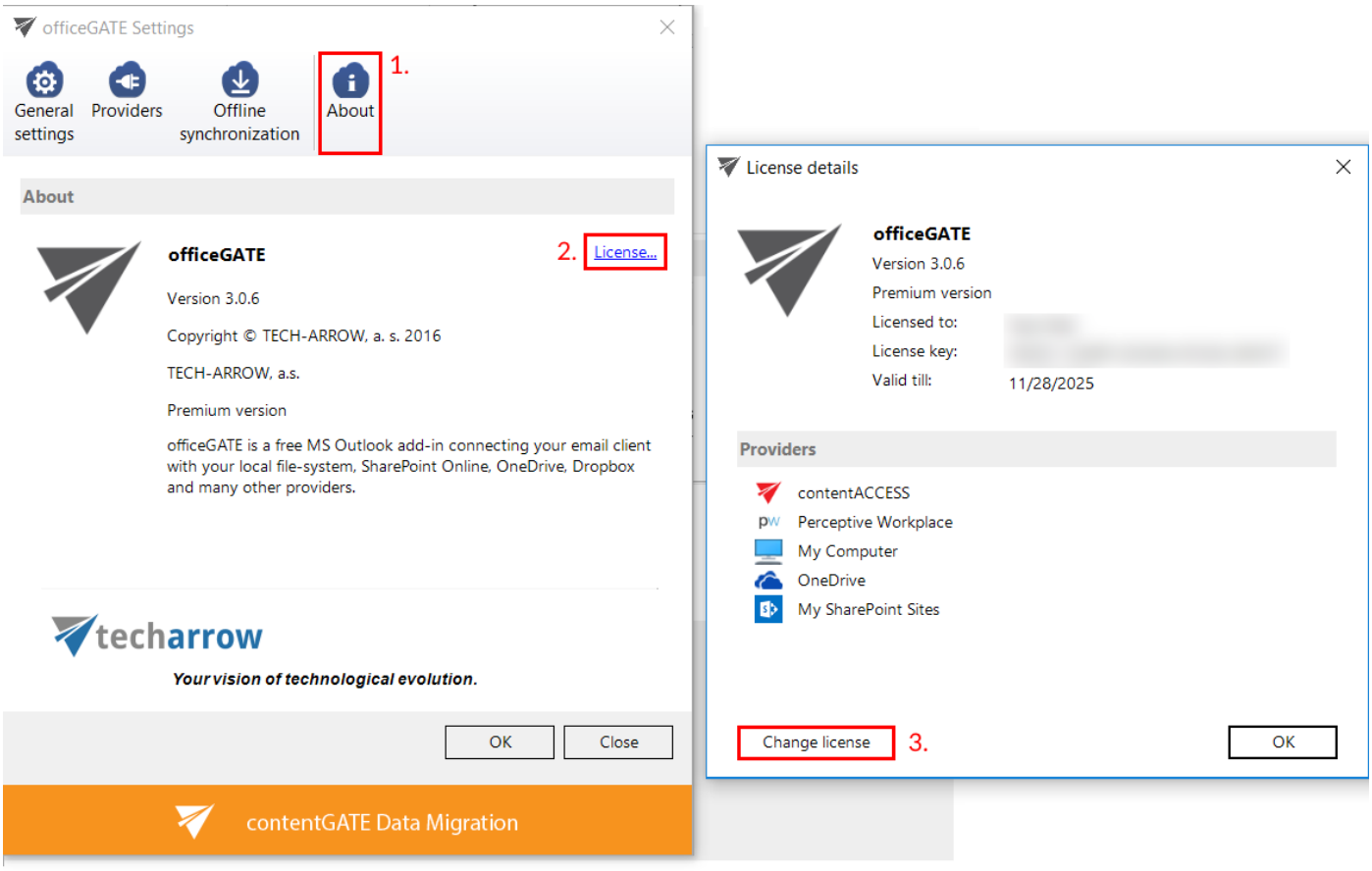
There can be situations, when the (manual or automated) synchronization is interrupted while it's running, or when the automated synchronization cannot be started. The reasons may be various: Outlook is turned off, there is no network connection in the office etc.

In such cases, officeGATE works like this:

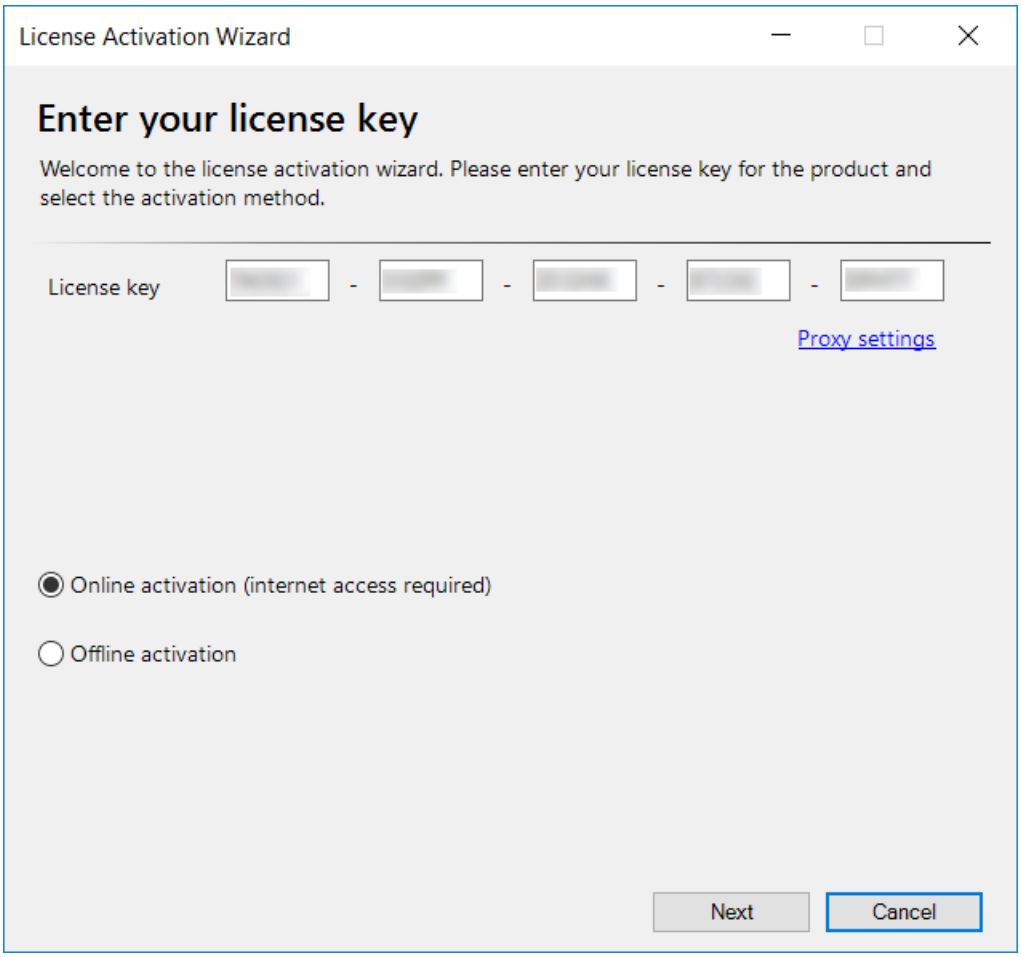
- **If Outlook is stopped while the synchronization is running** – synchronization is reset when Outlook is turned on again
- **If network connection is interrupted while synchronization is running** – synchronization is cancelled
- **If automated synchronization should start**, but **Outlook is turned 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 → **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.

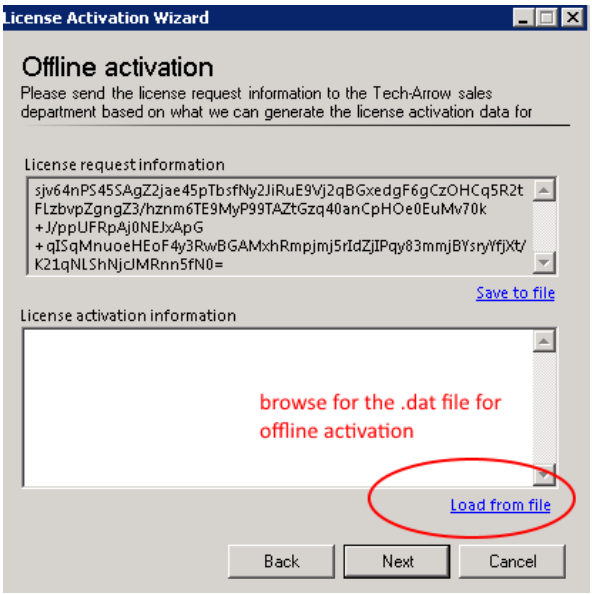


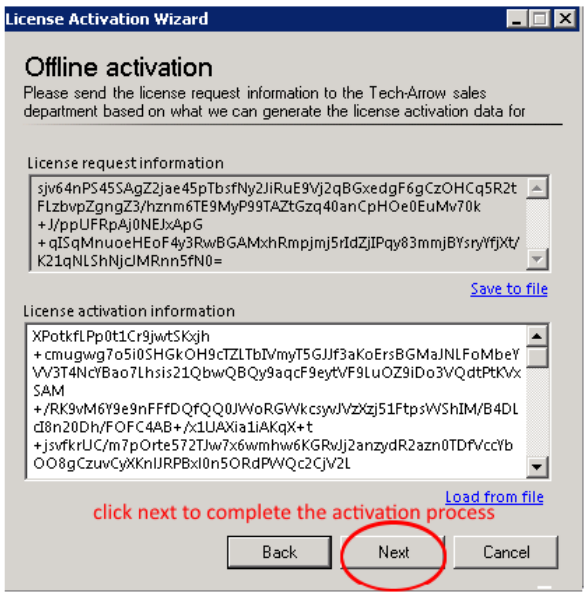
There are two options how to activate a license key:



1) **If you choose online activation** (internet access is required) – click **Next** and your license will be activated automatically.

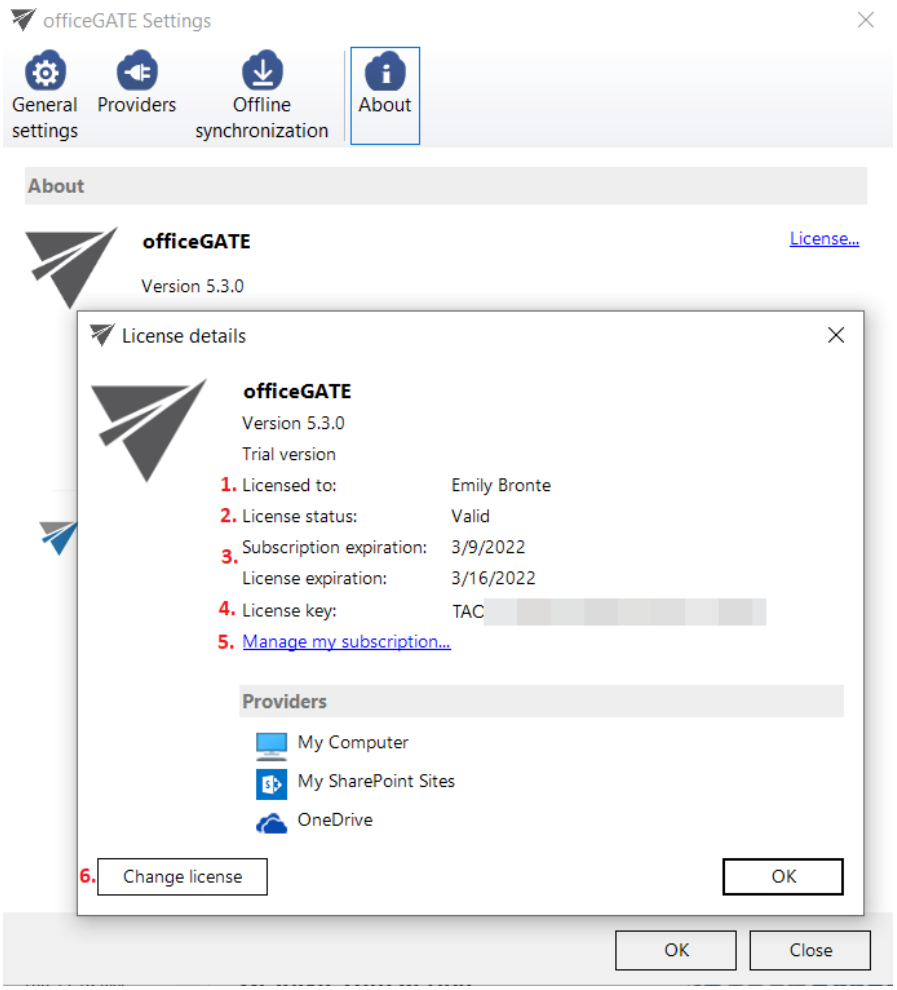
2) **If you choose offline activation** (no internet access is required) – click **Next** and send the license request information from the textbox below to the TECH-ARROW sales department. You can simply copy the **License request information** text directly to the email or you can save the information via Save to file 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 Load from file 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.





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 store.
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.



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

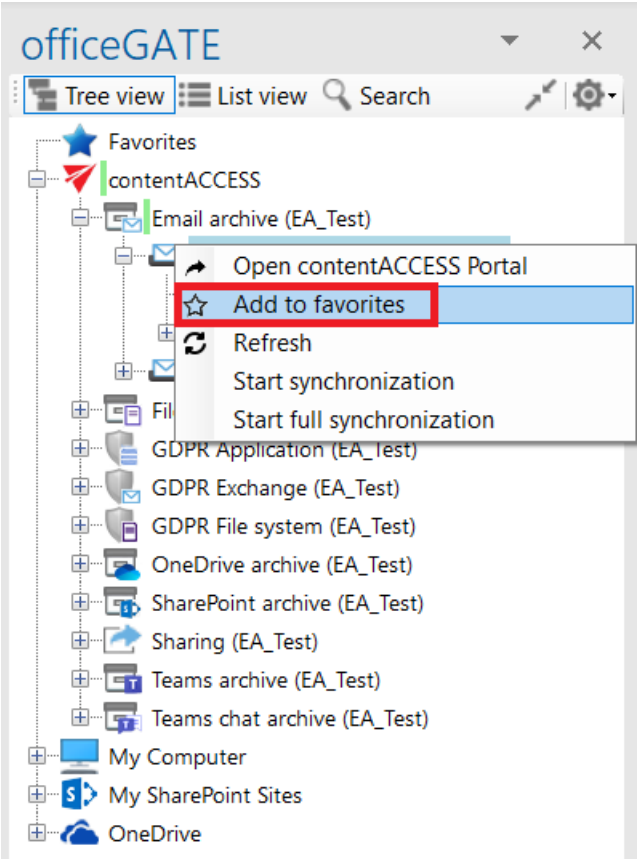
In the chapters above we have learnt how to launch officeGATE and how to connect to the desired providers (document management systems) that we want to work with. The next chapters will show how to handle with the documents using officeGATE.

Setting favorites

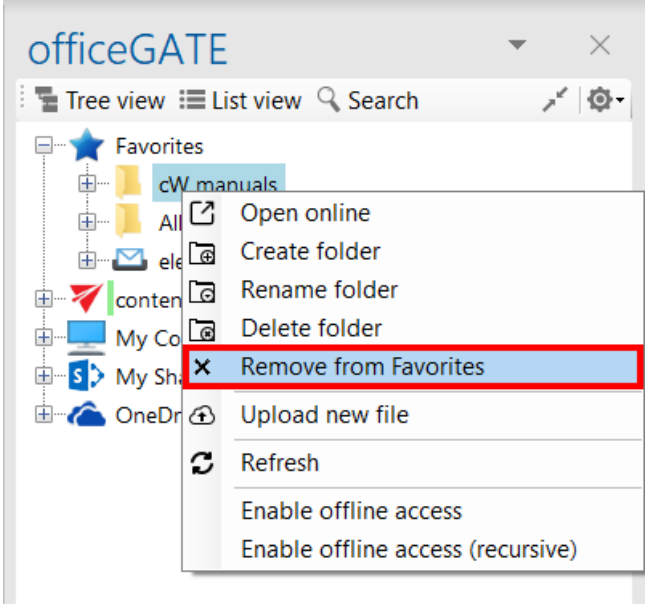
If you have a couple of folders/documents that you need to use more frequently, officeGATE offers the possibility to define them as favorites and have an easier access to them. The yellow star (the 1st node) in the officeGATE's tree view collects your favorites.

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

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



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.

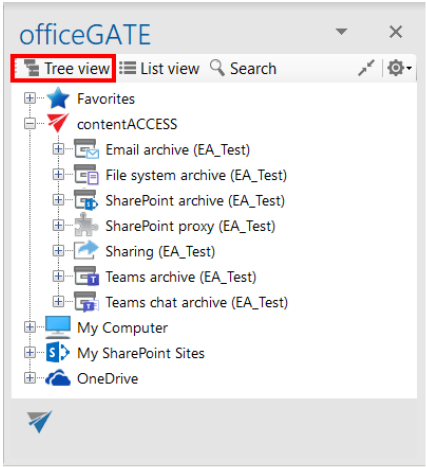


View selection: Tree view, List view, Collapse all

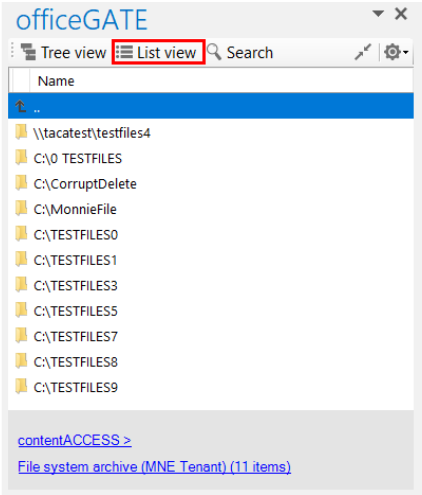
There are 3 main views available in the officeGATE's status pane:

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

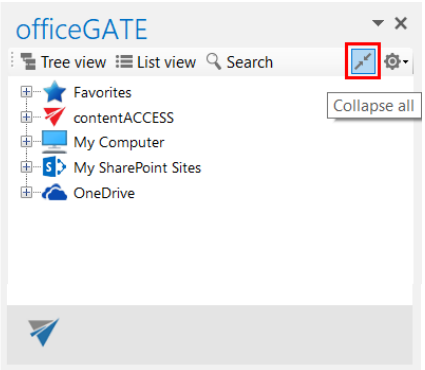
The user may also switch between tree view and list view a middle-mouse click, if this option is enabled in the **General settings** of officeGATE (read more in section General officeGATE settings).



Screenshot A: Tree view



Screenshot B: List view



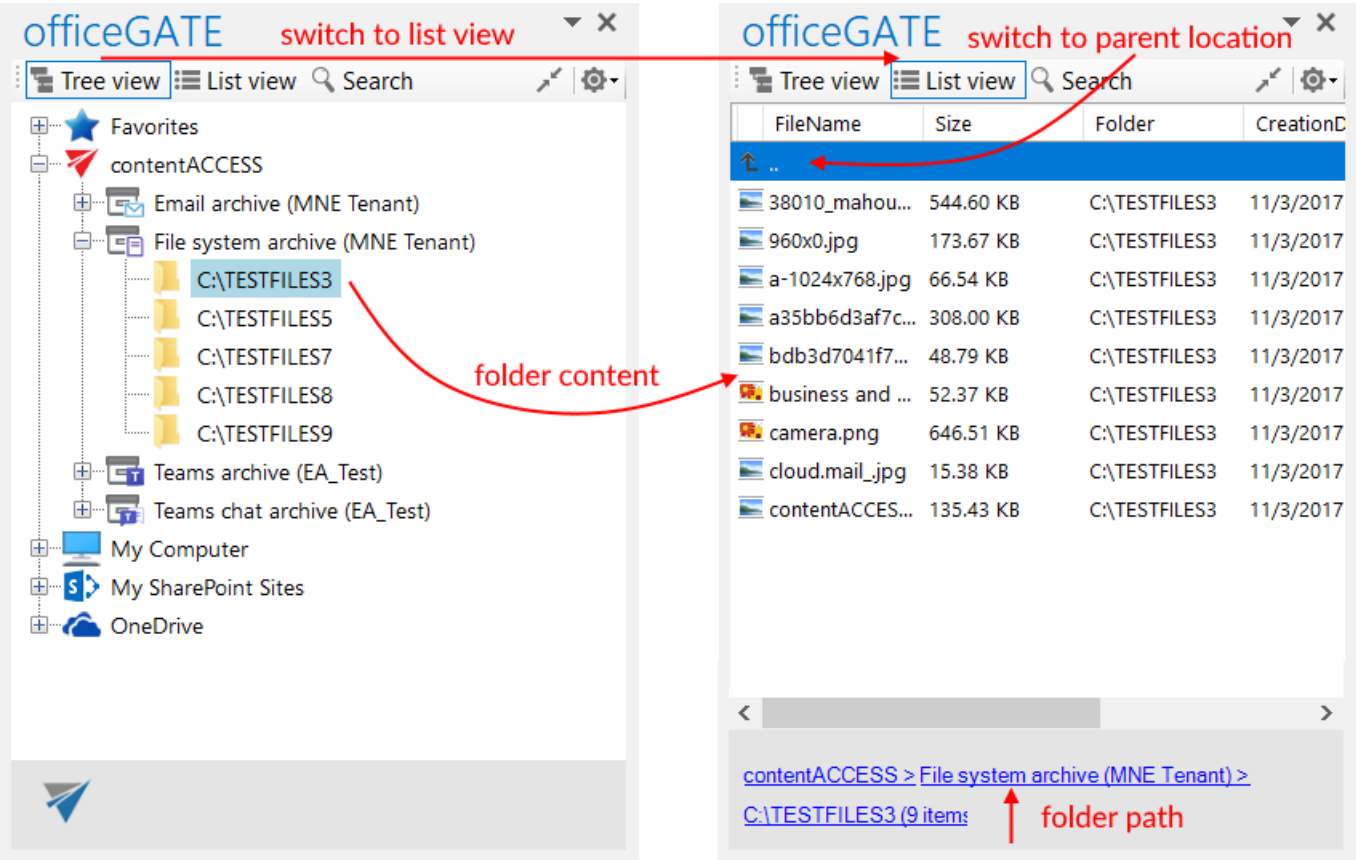
Screenshot C: Collapse all

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 Working with nodes and files using the context menu gives an overview for the user about the nodes' context menu options that are available in the respective officeGATE providers.

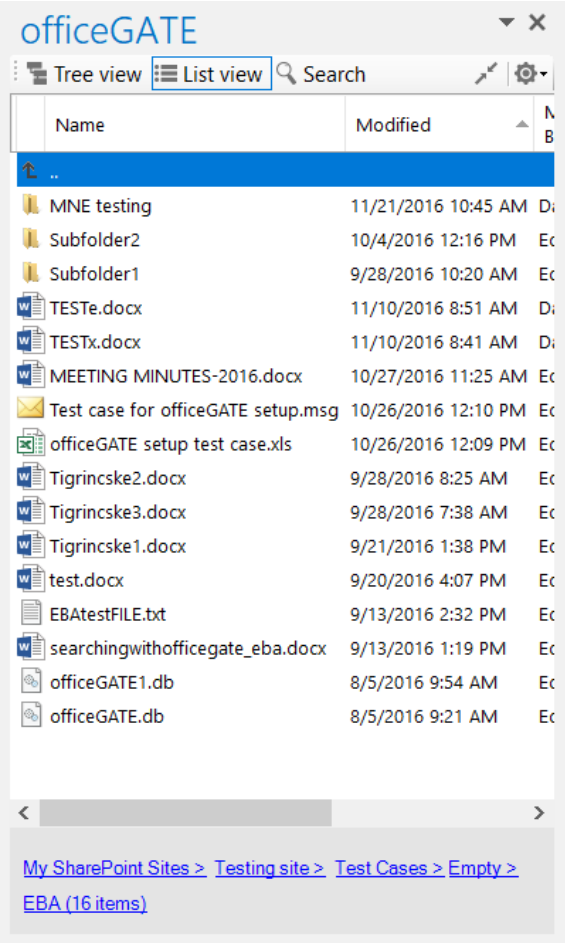
With the **Collapse all** option you can collapse the nodes that have been previously opened in the Tree view mode (Screenshot C above).

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

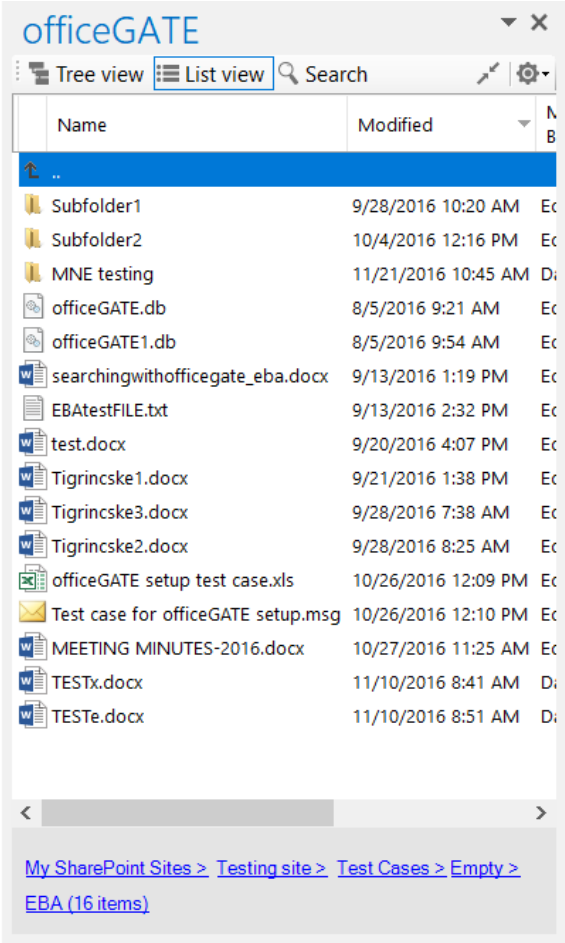


Sorting in List view

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



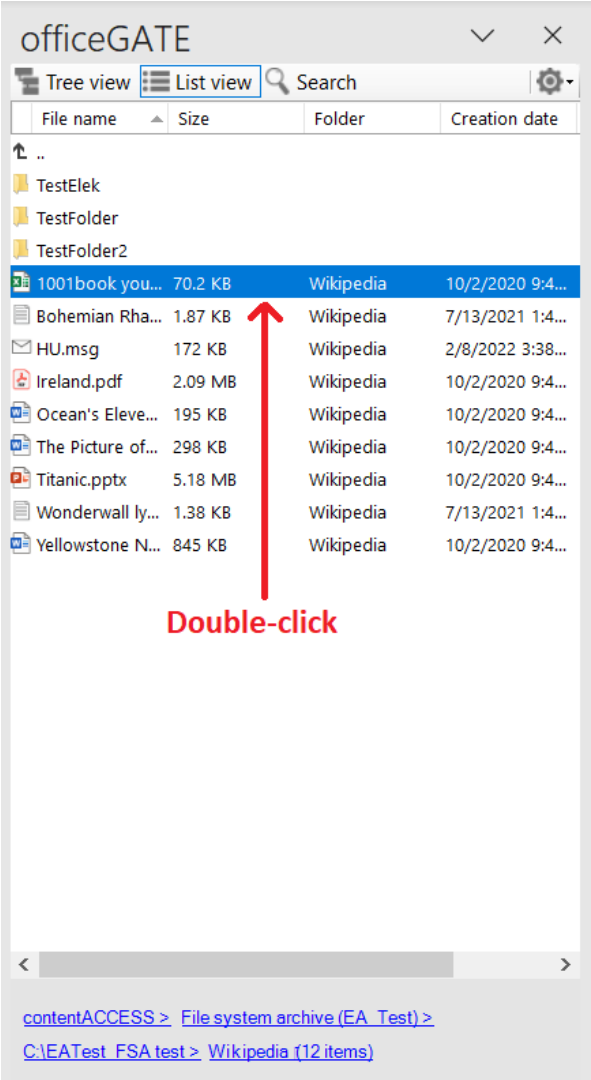
Screenshot A: Sorting the SharePoint files in order „from youngest to oldest"



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).



If the **Preview service** is installed (and enabled in the Central Administration) with the package, the user can view the file's preview in officeGATE.

The **Preview service** works with:

- the **attachments** of the emails (from Email archive and GDPR Exchange) and teams messages (Teams archive)
- the **files** from File System, OneDrive, and SharePoint archive, GDPR File system, and Teams archive (Files folder) models
- the **previous versions** of the items from the file-based models

When the Preview service is enabled, it's accessible from the file's icon or the context menu.

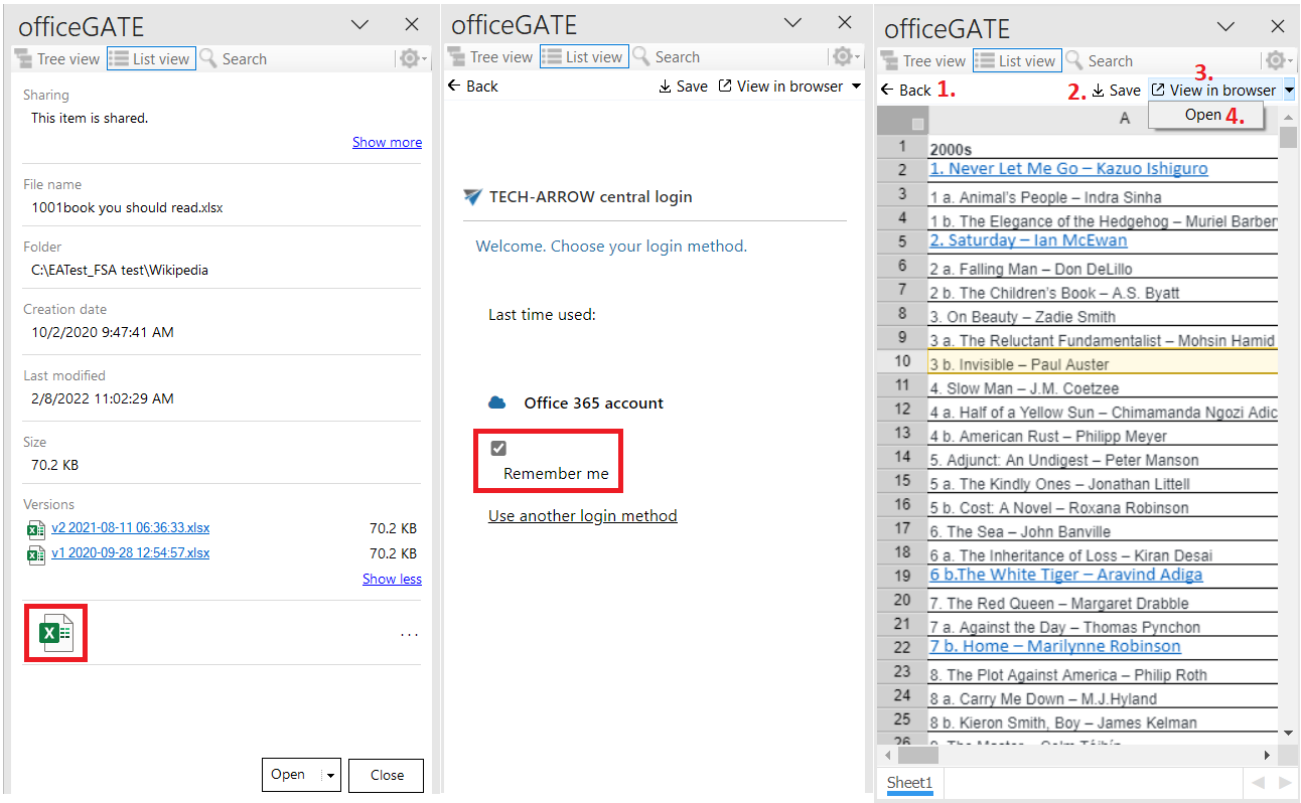
Click on the file' s icon

If you open a preview for the first time (or after the login session is expired), the login page appears. Here, you need to choose a login method.

Limitation: The **Remember me** must be checked in in the current version. Otherwise, the login page will appear whenever you open a file preview.

After the login, the item's preview appears. Here, the following options are available:

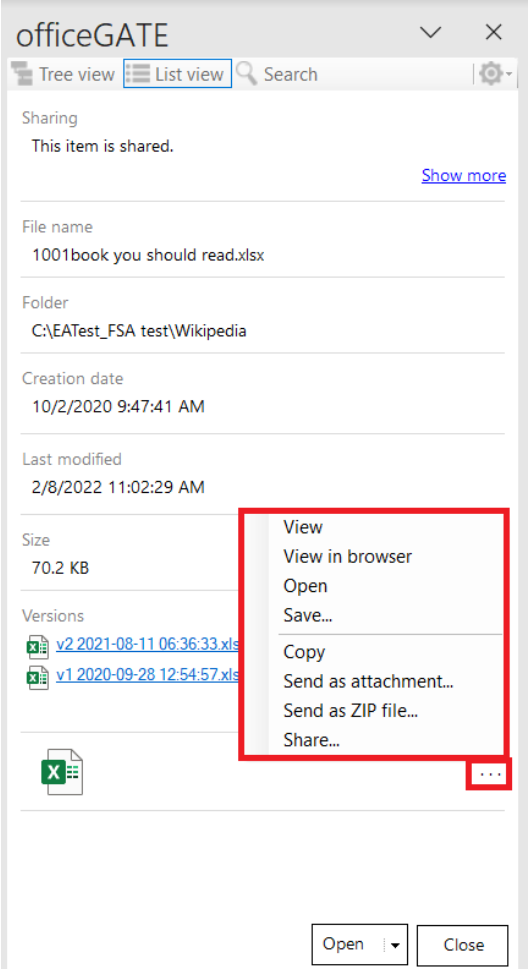
1. **Back** – you can go back to the item's preview where the metadata is displayed
2. **Save** – the user can save the file to his device
3. **View in browser** – opens the file in a browser, and the user can either download the original file or as a PDF
4. **Open** – opens the file in the designated application



Context menu

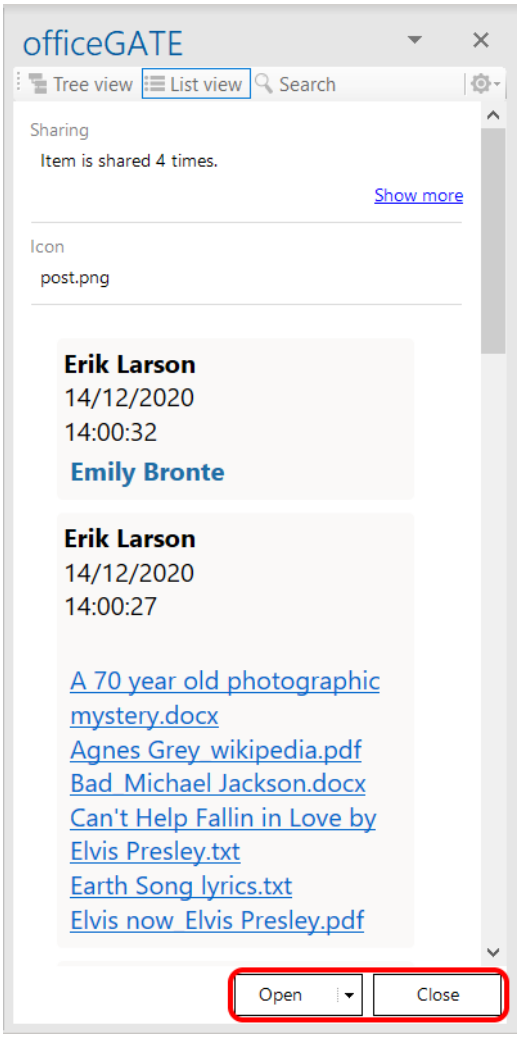
The following functions are available from here:

- **View** – opens the preview (Save and View in browser options displayed here)
- **View in browser** – opens the preview in the browser – download the original file or as PDF
- **Open** – opens the file in the designated application
- **Save** – saves the file to the local machine
- **Copy** – copies the document to the clipboard
- **Send as attachment** – attaches the file to a new email and sends it to the selected recipients
- **Send as ZIP** – sends the file as ZIP file to the selected participants
- **Share** – shares the selected file from the preview



Important: In the **Sharing** entity, opening the preview of an item (as the recipient) is considered a **download** and **will increase the download count**. Also, if the **download limit has been reached**, the context menu will disappear from the item preview, and the user won't be able to click on the item's icon.

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

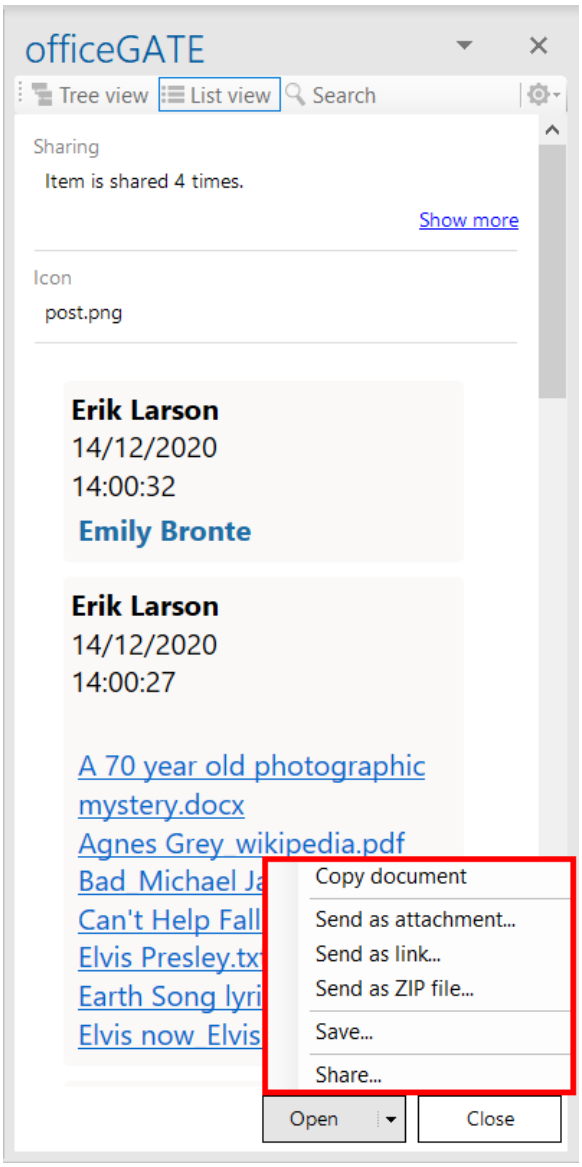


Screenshot: Preview and details of a Teams chat archive item

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

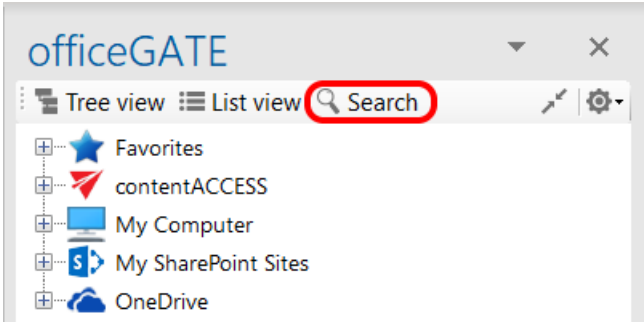
- Copy document

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



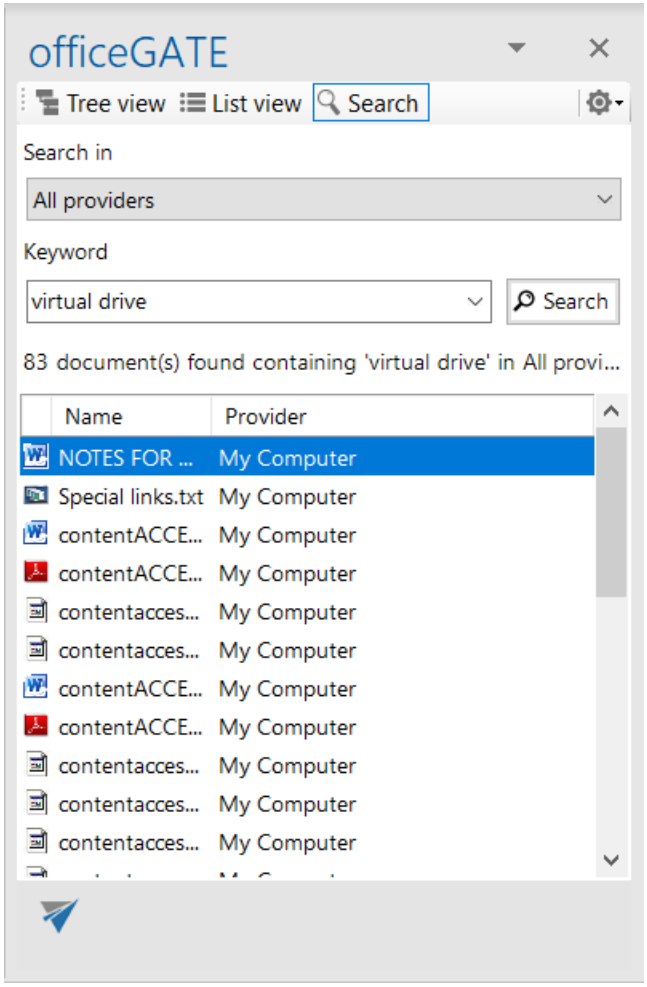
Searching in officeGATE

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.

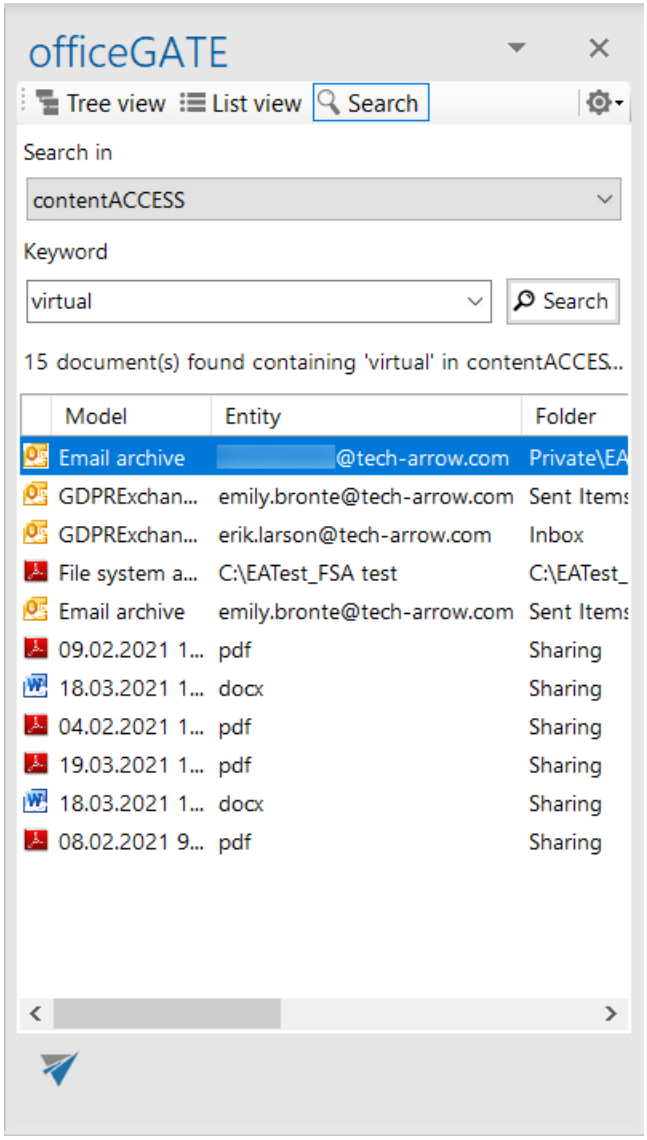


It is possible to search

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).

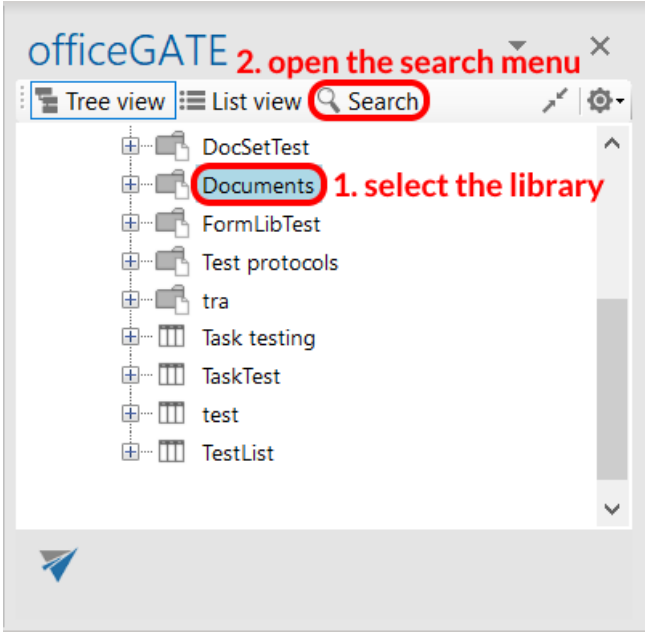


b) **In one of the connected providers** → in this case select the desired provider from the "Location" dropdown list, enter the demanded keyword and click "Search".

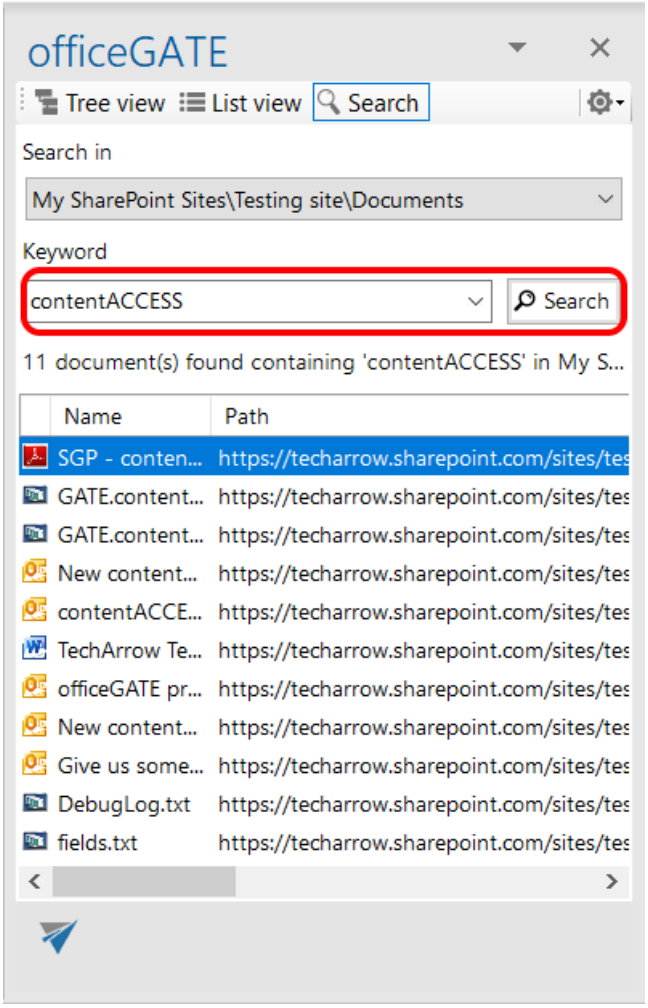


c) **In the selected node's content (node=folder or library)** → In this case locate the desired folder/library in the tree view and click on it. Then click on the magnifier mark in the pane to open the search page. The **Location** will be already preselected. Specify the keyword and click "Search".

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 ( ):



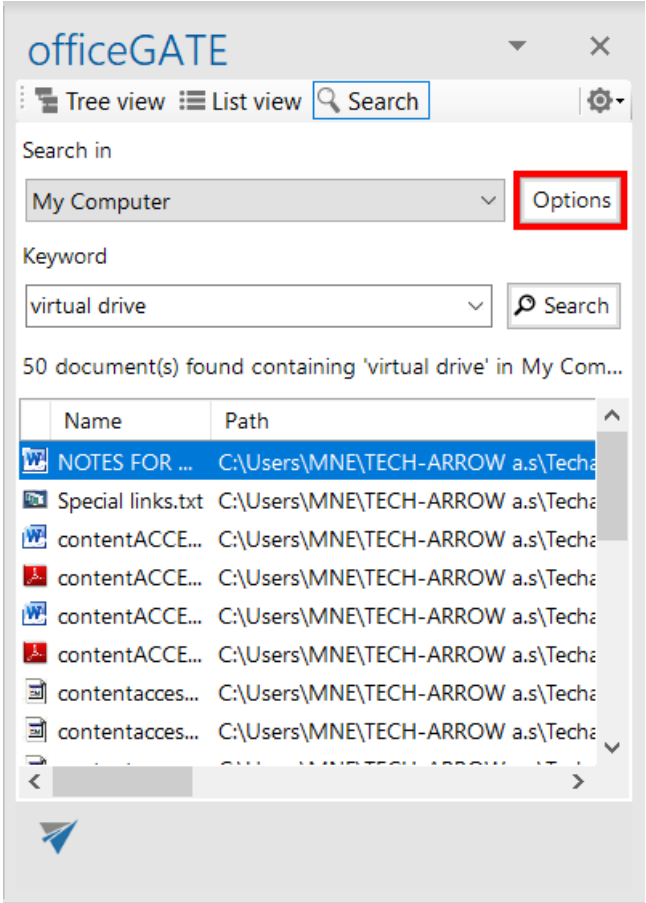
Specify the keyword that you are looking for (in our use case “contentaccess”) and click on **Search**:



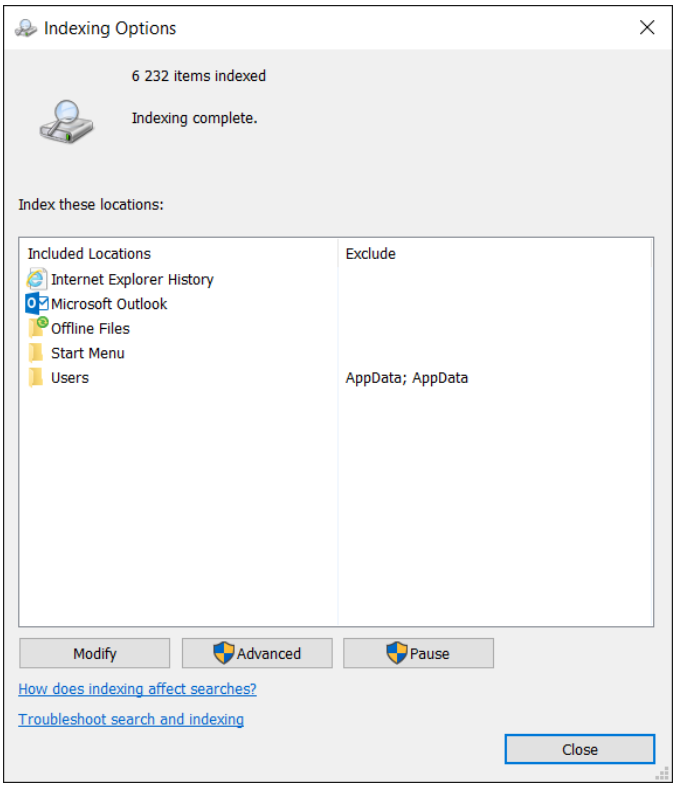
11 documents have been found, of which title or text contains phrase “contentaccess”.

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.

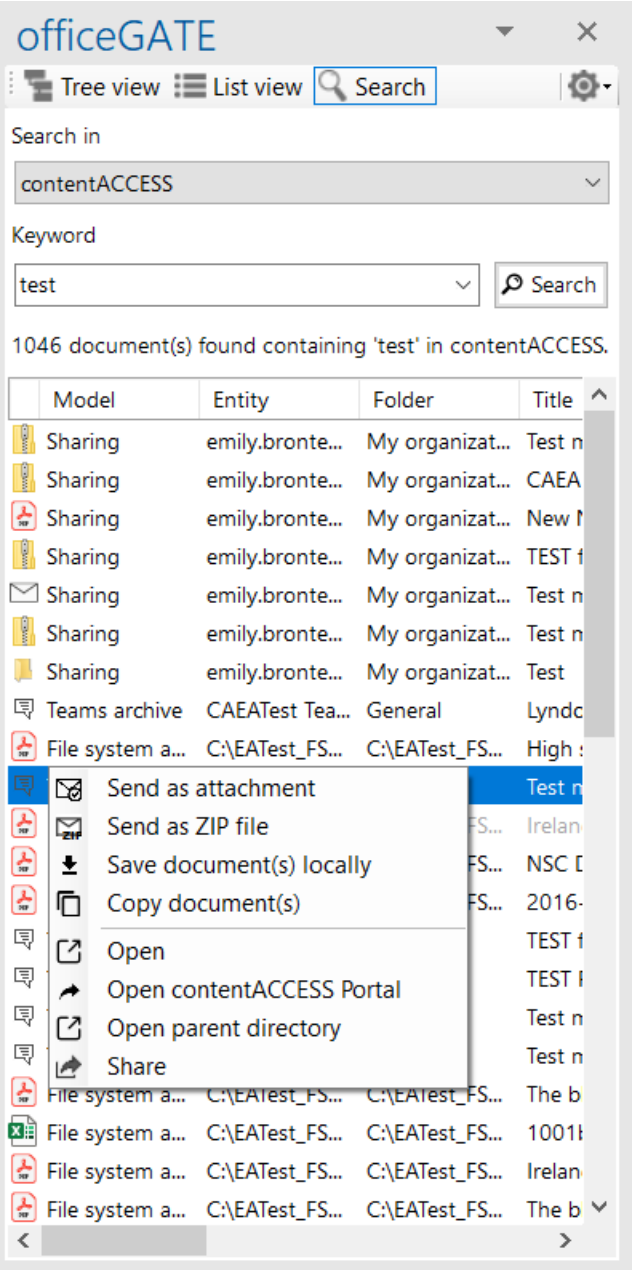


Note: Only the documents located on the **indexed local disks** can be searched for.



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 *

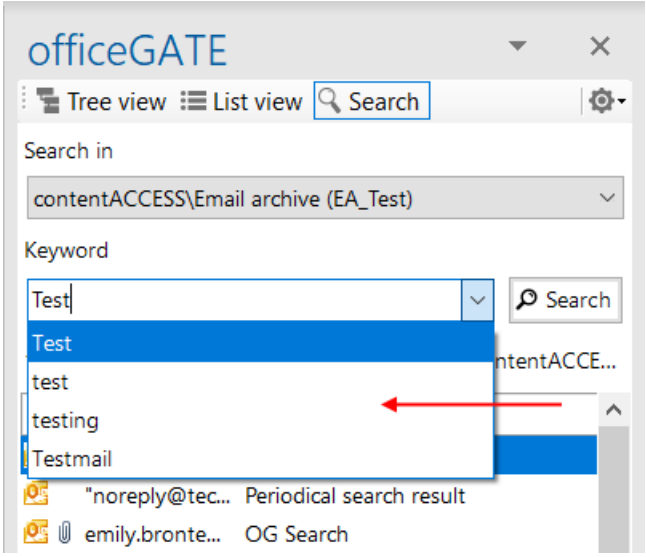


*These features are described in details in chapter Working with nodes and files using the context menu of this guide

Searching with Search suggestions

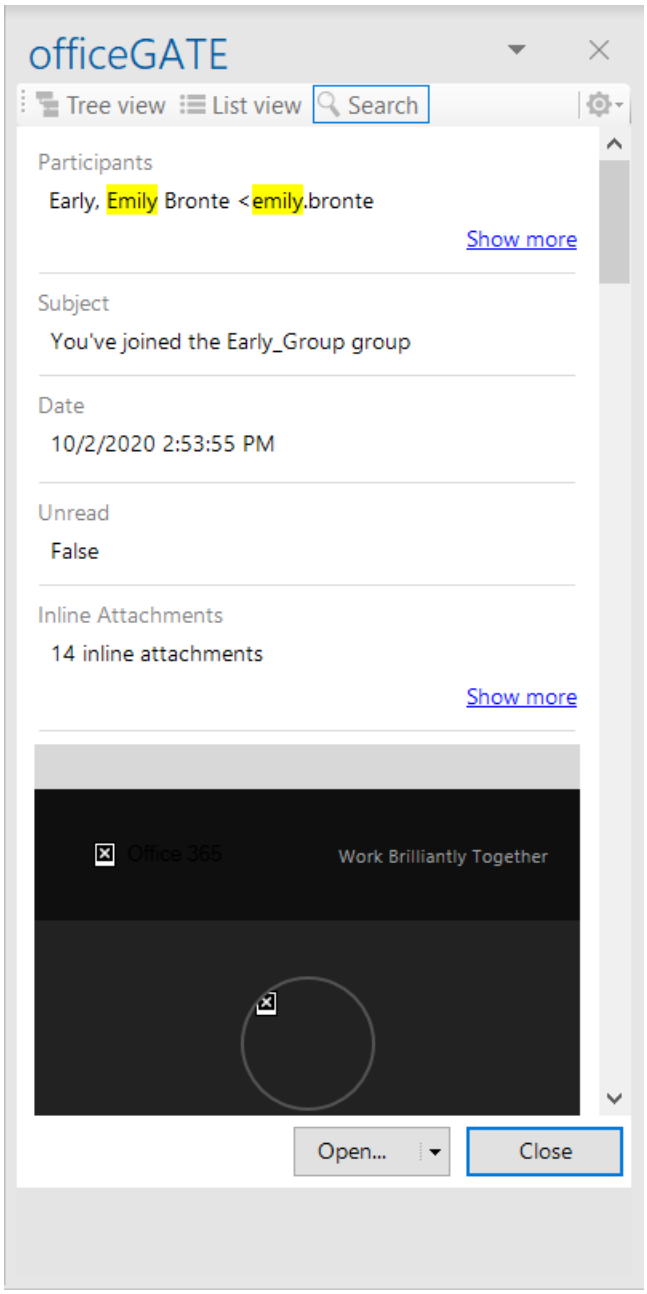
If the **Search suggestions** are enabled in System settings for the contentACCESS server officeGATE is connected to, system generate search suggestions. Search suggestions are possible search terms related to

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.



Searching with Hit highlighting

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



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 **NOT** keyword. The keyword is **case sensitive**, so it must be **always written in UPPERCASE**. The **exclamation mark "!"** 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
- !value

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
To:	(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

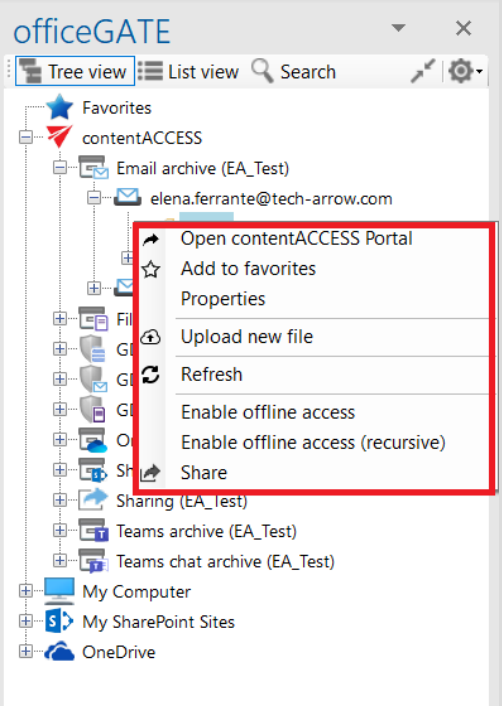
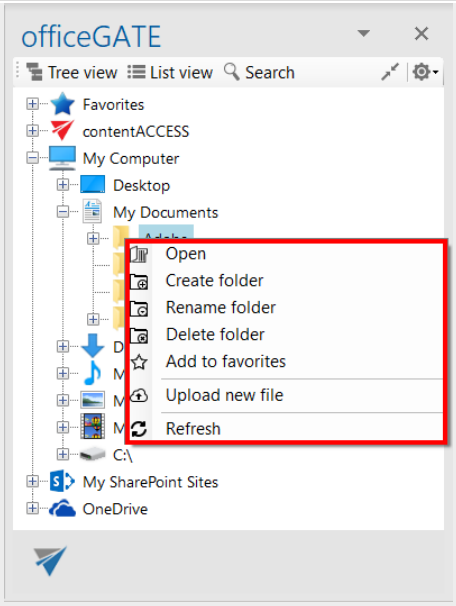
SharePoint document properties

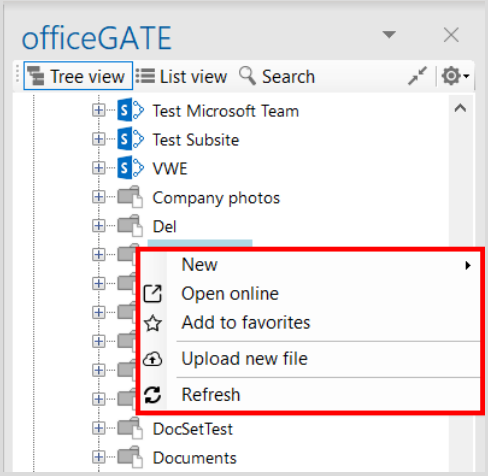
The properties below are applicable when searching in SharePoint archive

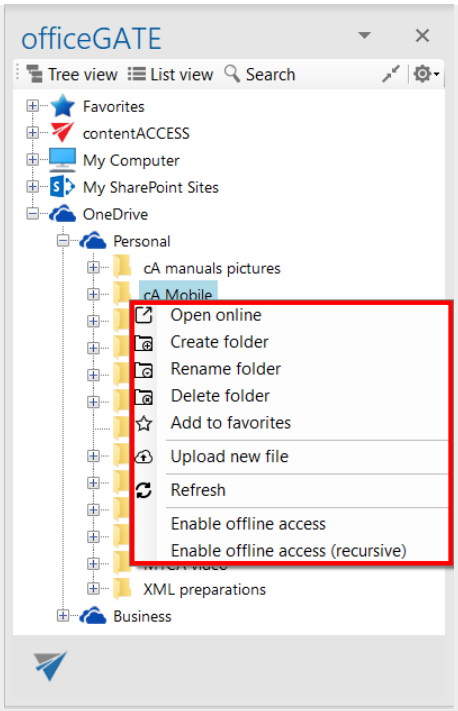
Property	Specificity	Description
CreatedBy:	(string)	condition on user who created the file
CreationDate:	(date)	condition on creation date
FileSize:	(number)	condition on file size
Date | ModificationDate:	(date)	condition on modification date
ModifiedBy:	(string)	condition on user who modified the 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

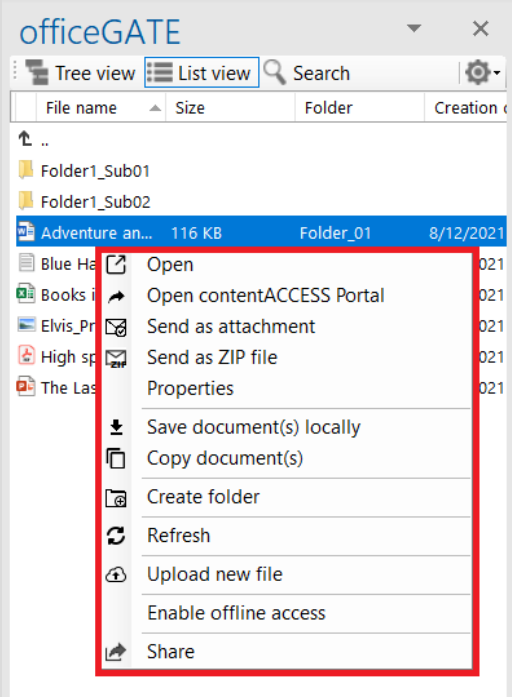
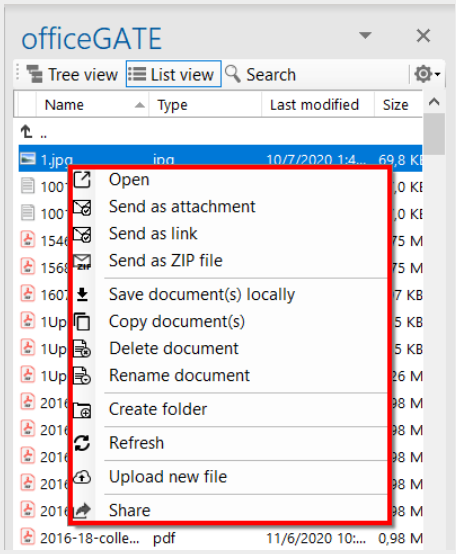
The officeGATE user handles with his folders/libraries/documents using the context menu of the respective folder/library/file in the pane. The table below lists all available operations in the context menu of a folder/library. Locate your desired folder/library in the pane, right click on it to open 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:

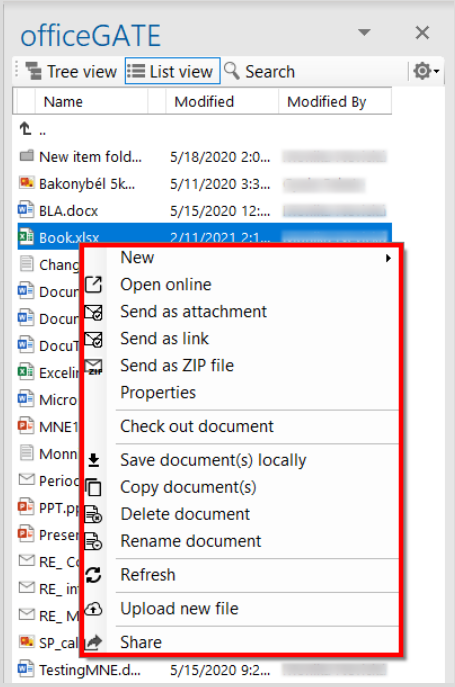
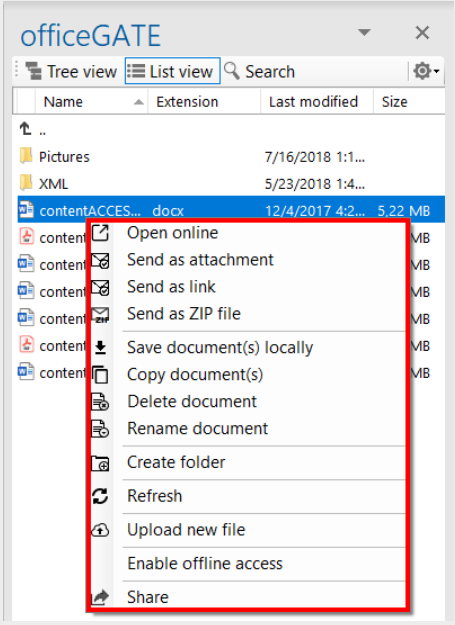
Providers	Operations on folders/libraries using their context menu	
contentACCESS	✓ Open contentACCESS Portal ✓ Add to favorites ✓ Properties ✓ Upload new file ✓ Refresh ✓ Enable offline access ✓ Enable offline access (recursive) ✓ Share	
My Computer (including local Dropbox and OneDrive folders)	✓ Open ✓ Create folder ✓ Rename folder ✓ Delete folder ✓ Add to favorites ✓ Upload new file ✓ Refresh	

SharePoint	**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) ✓ 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	

OneDrive and OneDrive for Business	✓ Open online ✓ Create folder ✓ Rename folder ✓ Delete folder ✓ Add to favorites ✓ Upload new file ✓ Refresh ✓ Enable offline access ✓ Enable offline access (recursive)	

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 providers	Operations on files using their context menu	
contentACCESS	✓ Open ✓ Open contentACCESS Portal ✓ Send as attachment ✓ Send as ZIP file ✓ Properties ✓ Save document(s) locally ✓ Copy document(s) ✓ Create folder ✓ Refresh ✓ Upload new file ✓ Enable offline access ✓ Share	
My computer (including local Dropbox and OneDrive files)	✓ Open ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Delete document ✓ Rename document ✓ Create folder ✓ Refresh ✓ Upload new file ✓ Share	

Sharepoint	✓ New (with submenu items based on the selected site/document set/folder/list templates) ✓ Open online ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Properties ✓ Save document(s) locally ✓ Copy document(s) ✓ Delete document ✓ Rename document ✓ Refresh ✓ Upload new file ✓ Share	
OneDrive and OneDrive for Business	✓ Open online ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Delete document ✓ Rename document ✓ Create folder ✓ Refresh ✓ Upload new file ✓ Enable offline access ✓ Share	

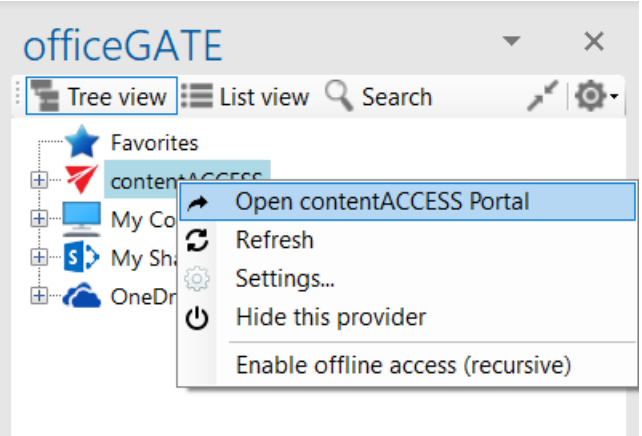
For instructions on everyday use cases of working with files in officeGATE, read the below described topics. Select your provider from the officeGATE pane and connect to it if it's not connected automatically. Then switch to list view, locate the file(s) that you want to work with, and open its context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

Open contentACCESS Portal

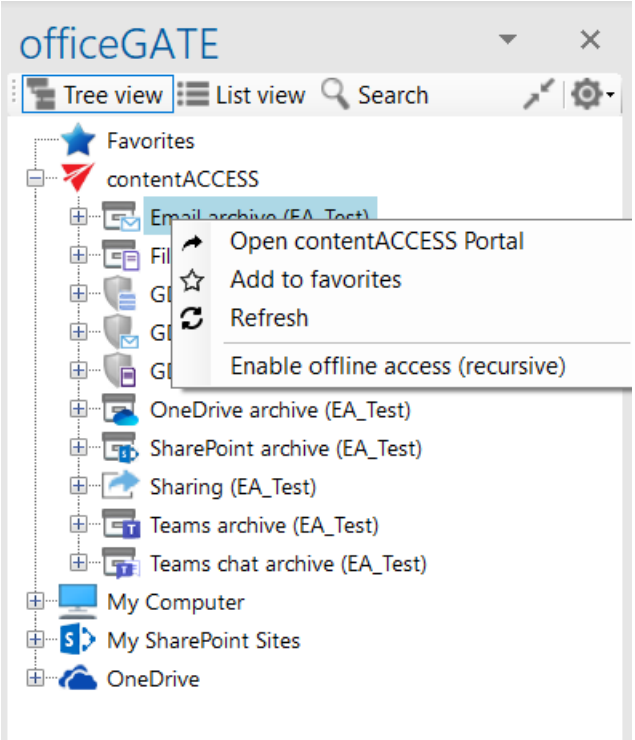
Note: This option is active only on the contentACCESS provider.

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

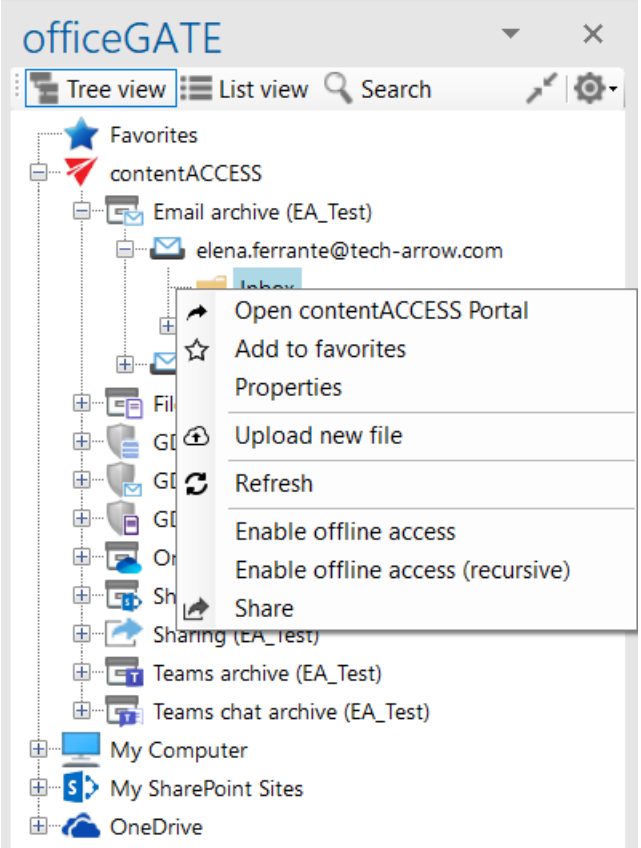
- provider node – redirects the user to contentACCESS Portal; no specific entity, folder or item is selected



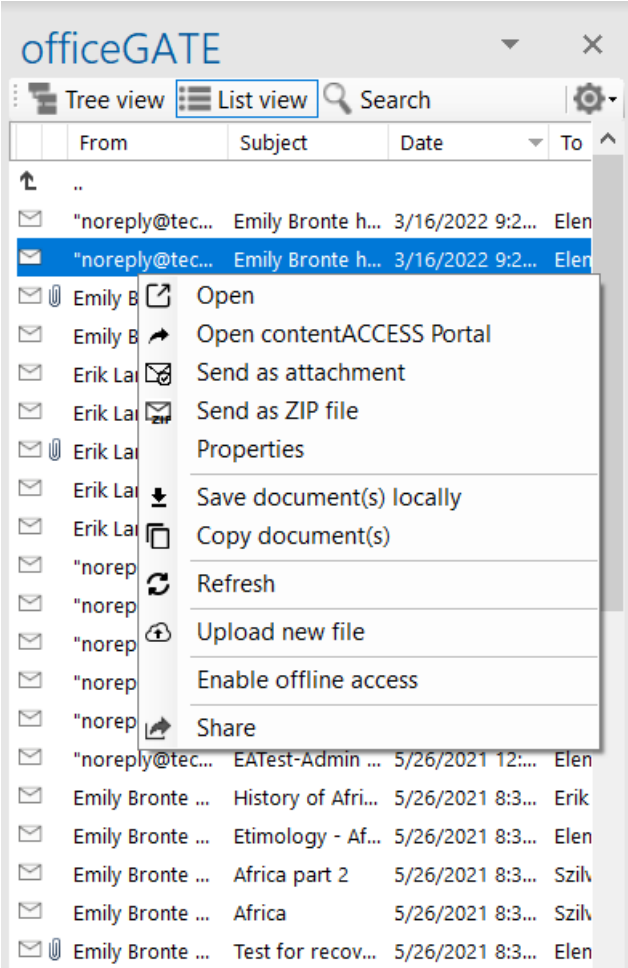
- entity node - opens the selected entity (mailbox, file archive root, etc. - depending on model type) in contentACCESS Portal



- folder node - opens the selected folder in contentACCESS Portal

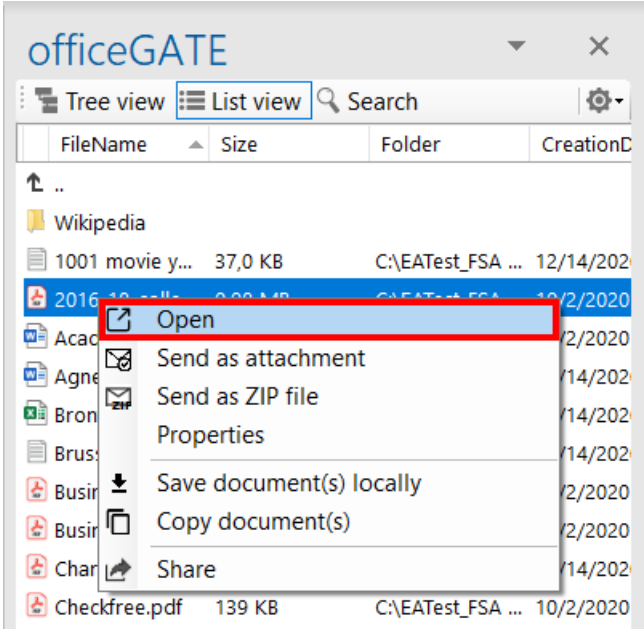


- document node - shows the selected document (email, file...) in contentACCESS Portal



Online opening and editing of files directly from officeGATE

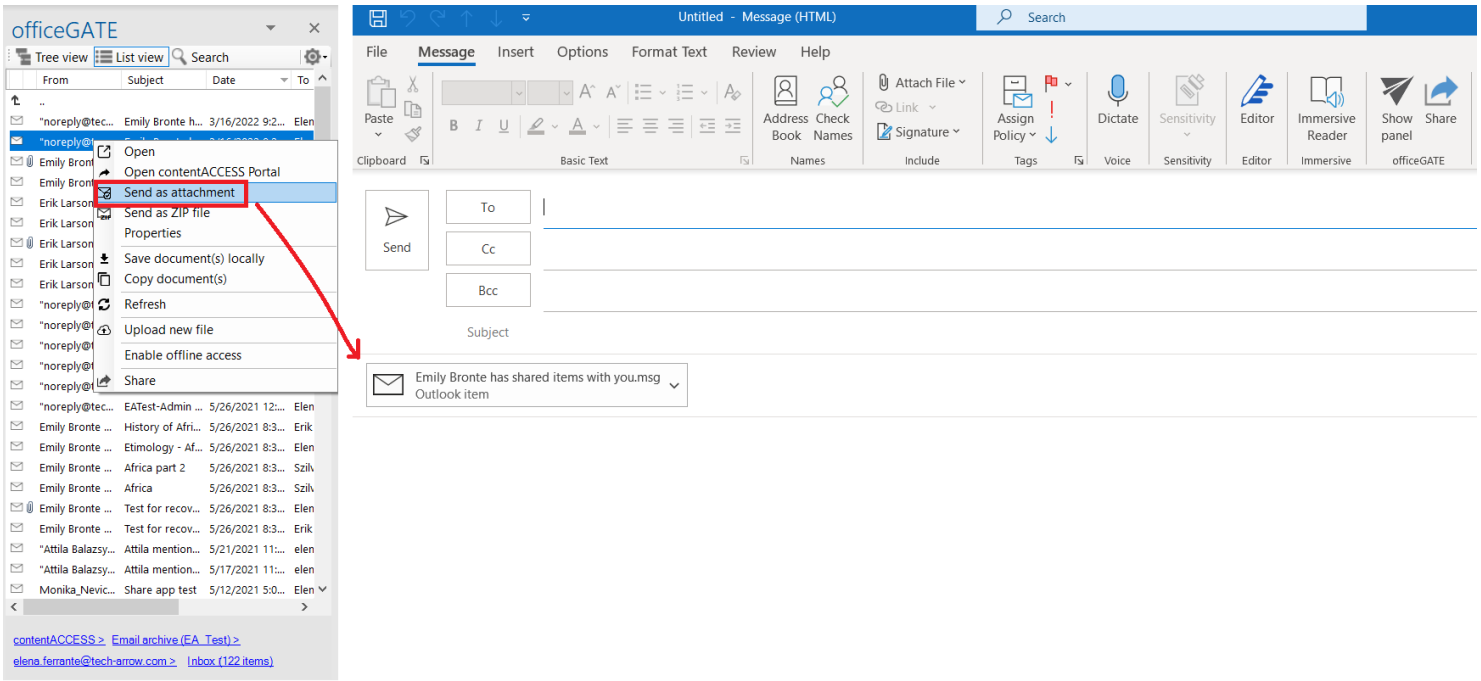
If you need to check a file or to do any modifications to it, choose **Open** from the file's context menu. This context menu option opens the respective file online, from the server (source system) directly. To edit the file, do the necessary corrections in it and save it. This way you can do the necessary 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

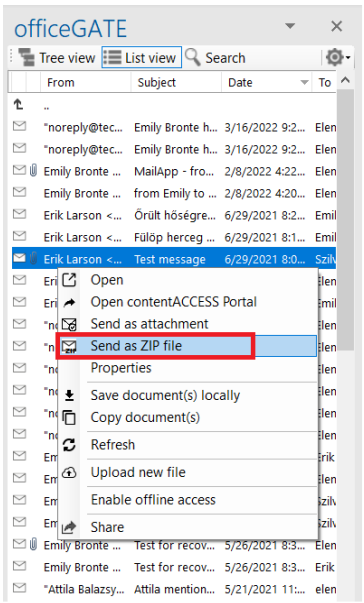
If you want to send the file itself, right click on the file and choose **Send as attachment** from its context menu. The files will be automatically attached to a newly opened email. It is possible to select multiple files to attach.

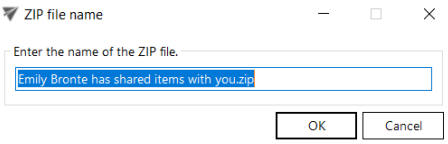


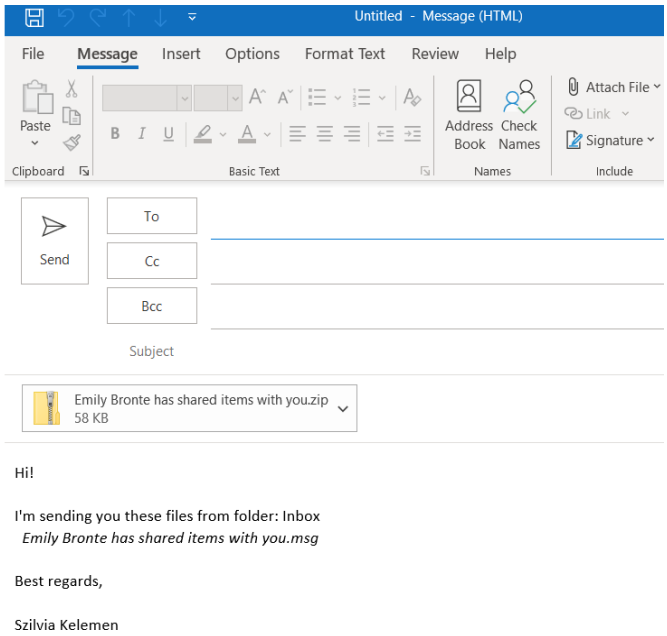
Sending ZIP files

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.



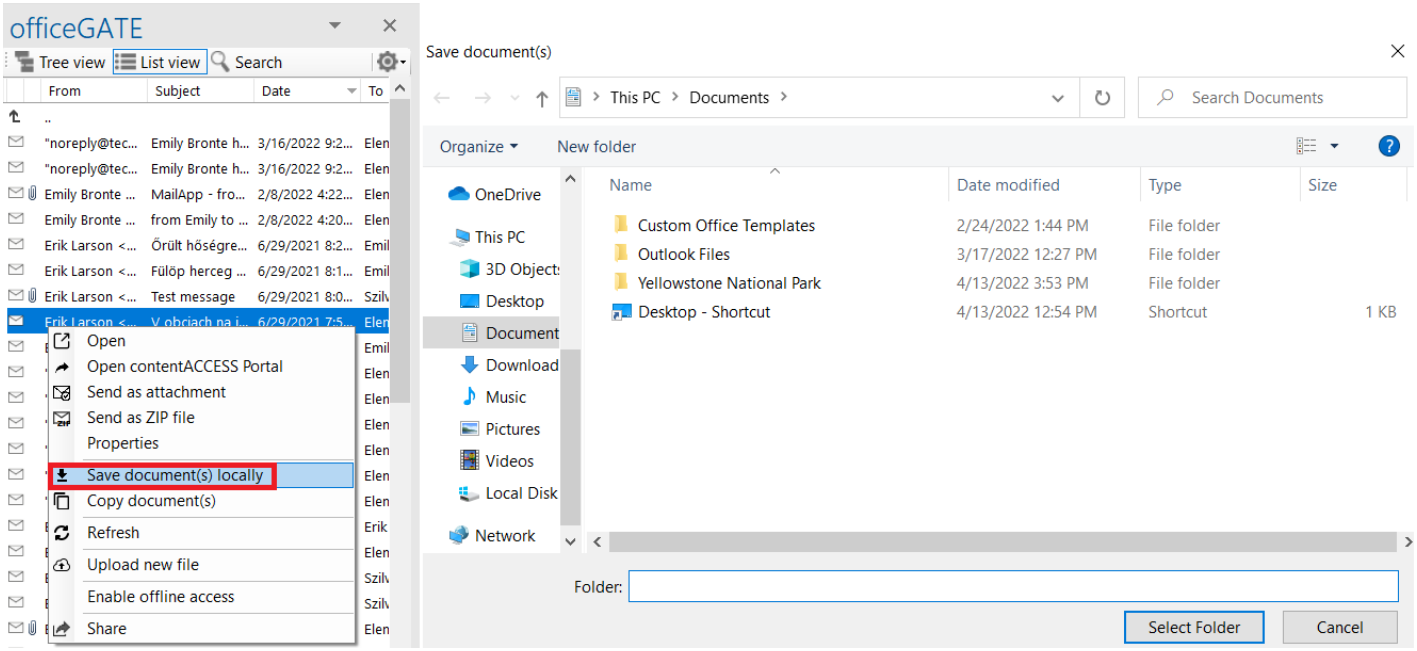




1: Select the files and click on “Send as ZIP 2: Rename the ZIP 3. Send the ZIP

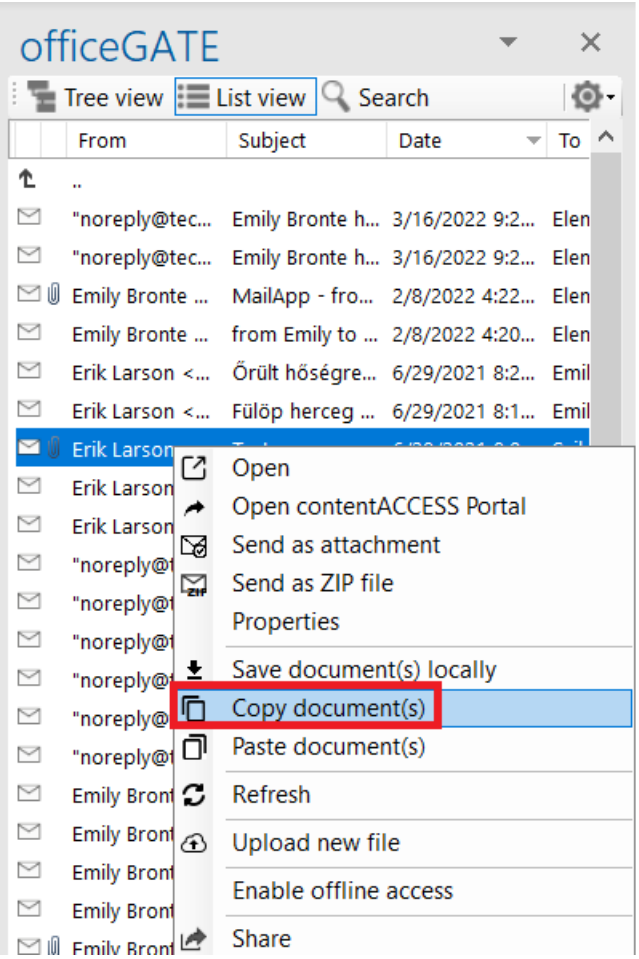
Saving document(s) locally

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

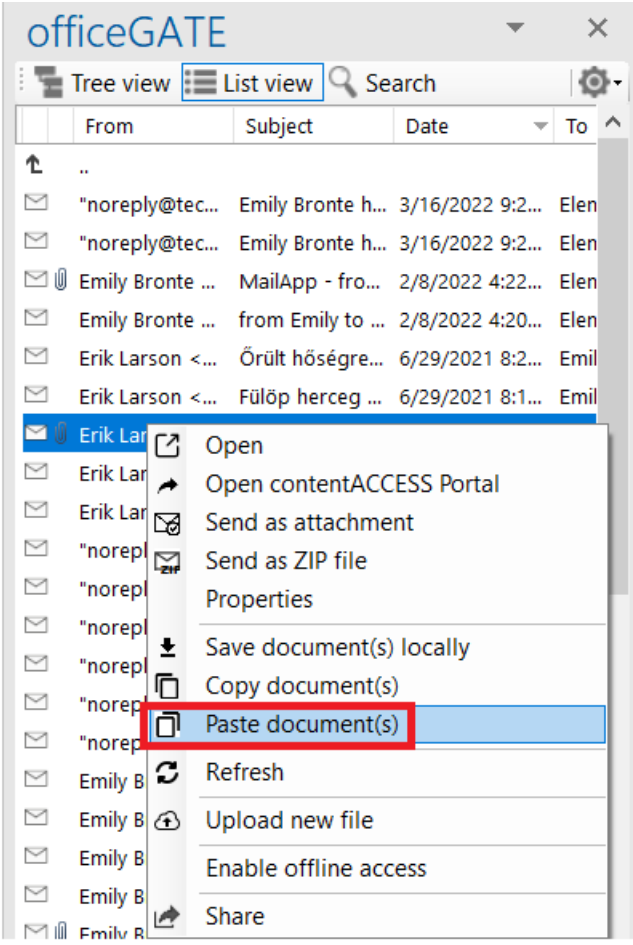


Copying/pasting document(s)

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



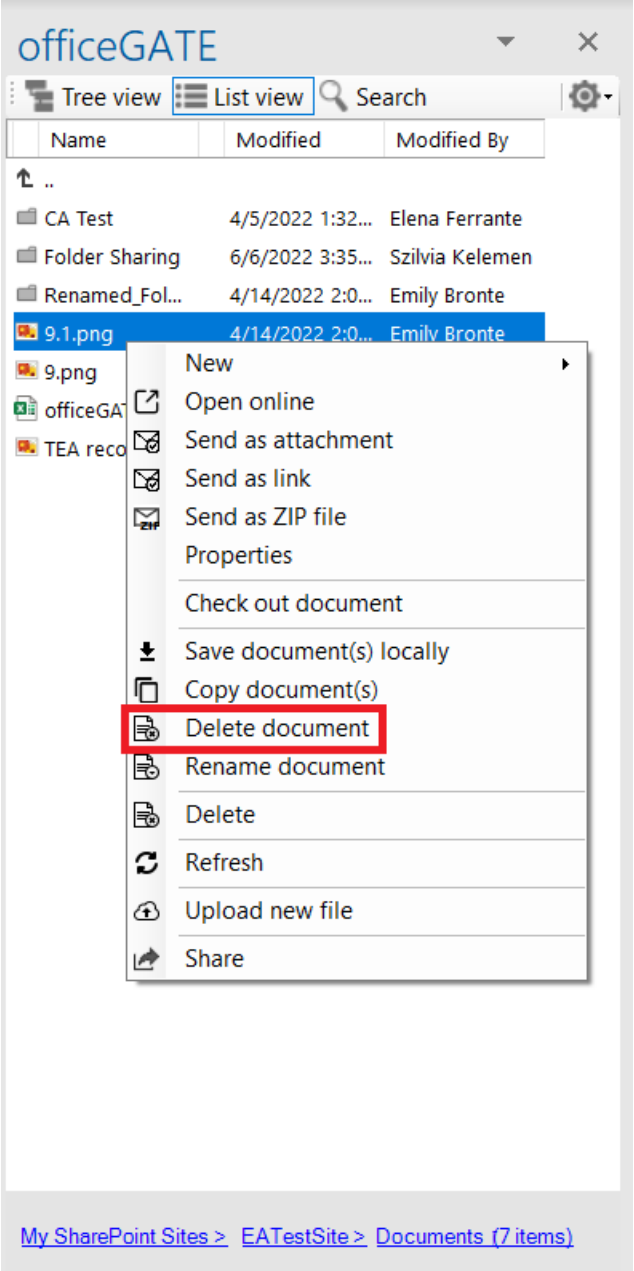
Screenshot A: Copy document(s) from a source location



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

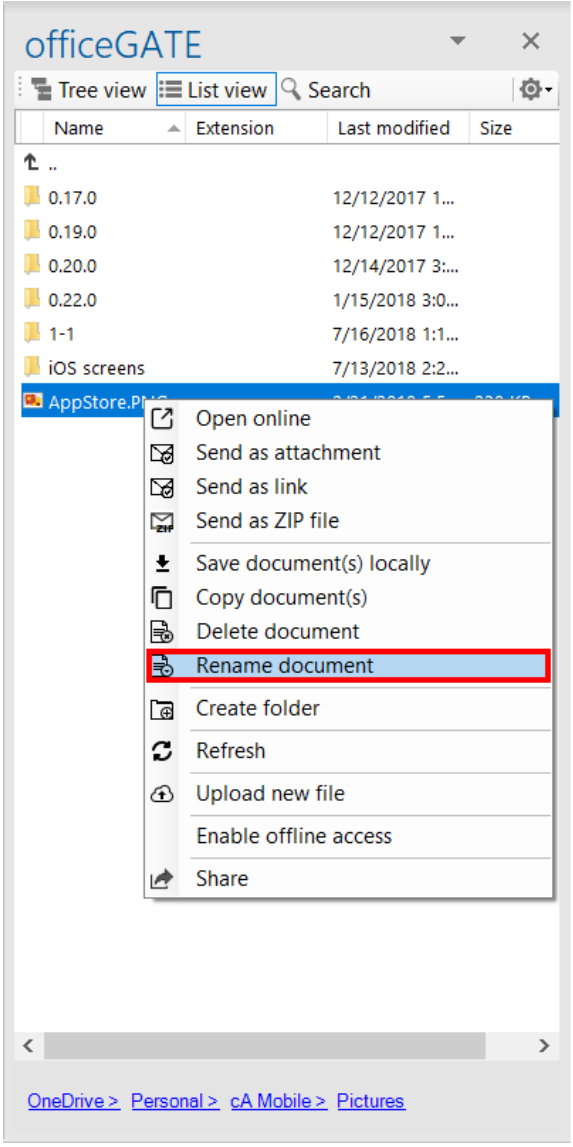
Deleting document(s)

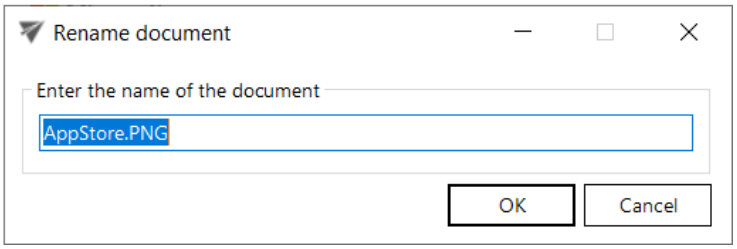
To delete one or multiple documents from the file system, open the document's context menu (in list view) and click on **Delete document**. This function is available only in providers My computer, My SharePoint sites, and OneDrive.



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**.

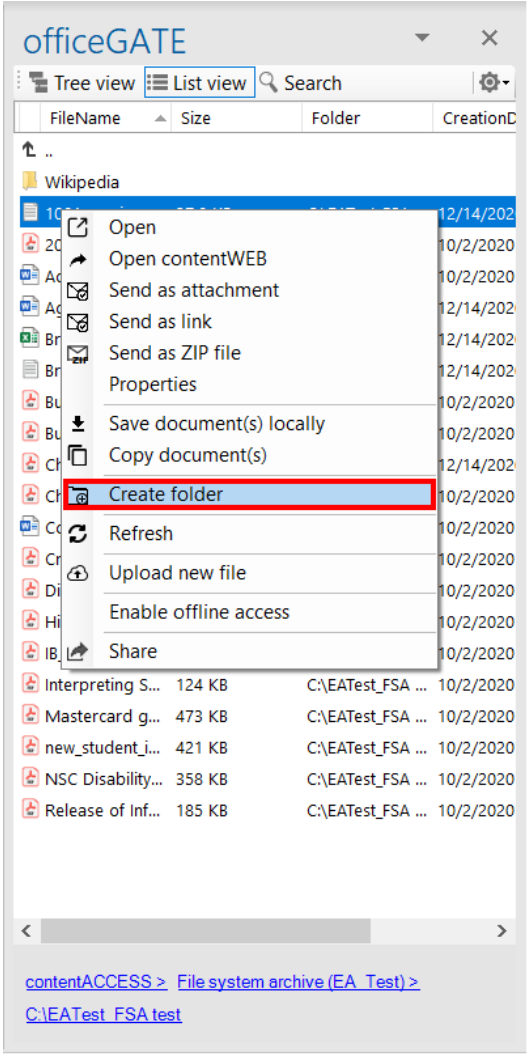


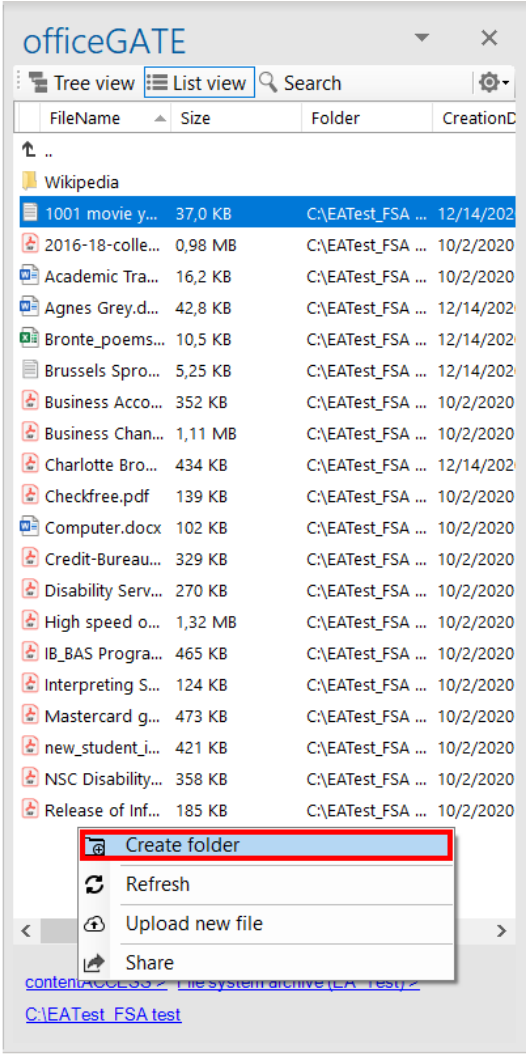


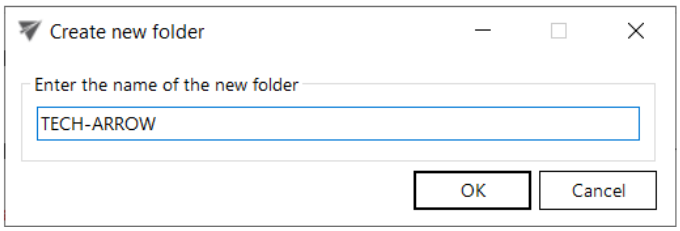
Creating folder(s)

There are two ways to create a new folder.

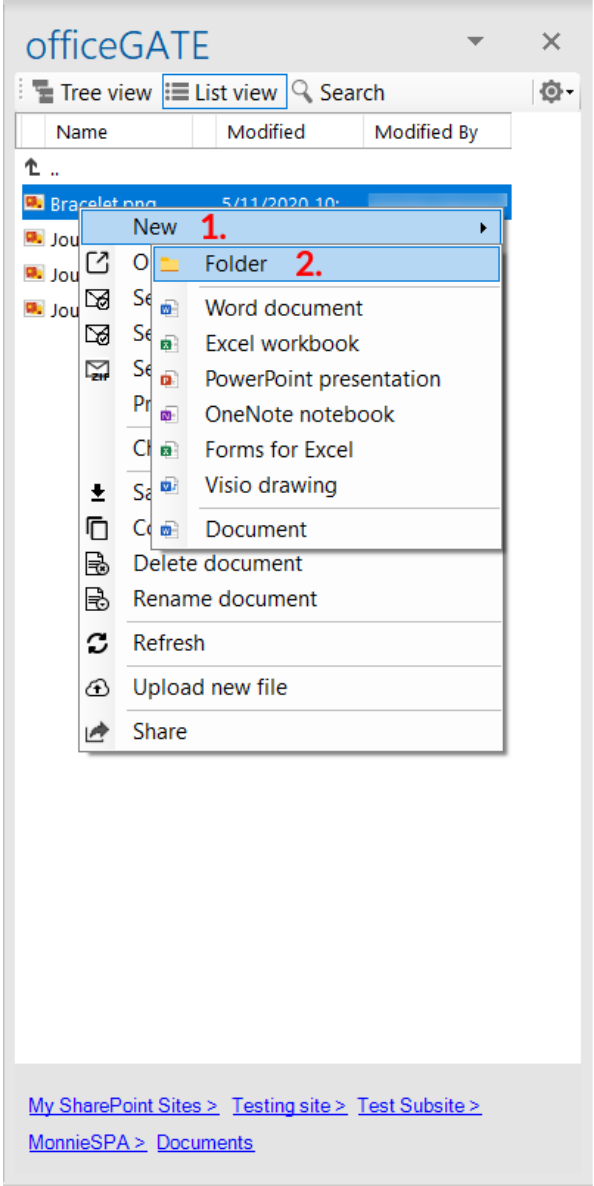
First way is to select **Create folder** option from the item's context menu (or switch to list view and right click into the navigation pane). The **Create new folder** dialog opens. Type in the folder's name and click **OK**.

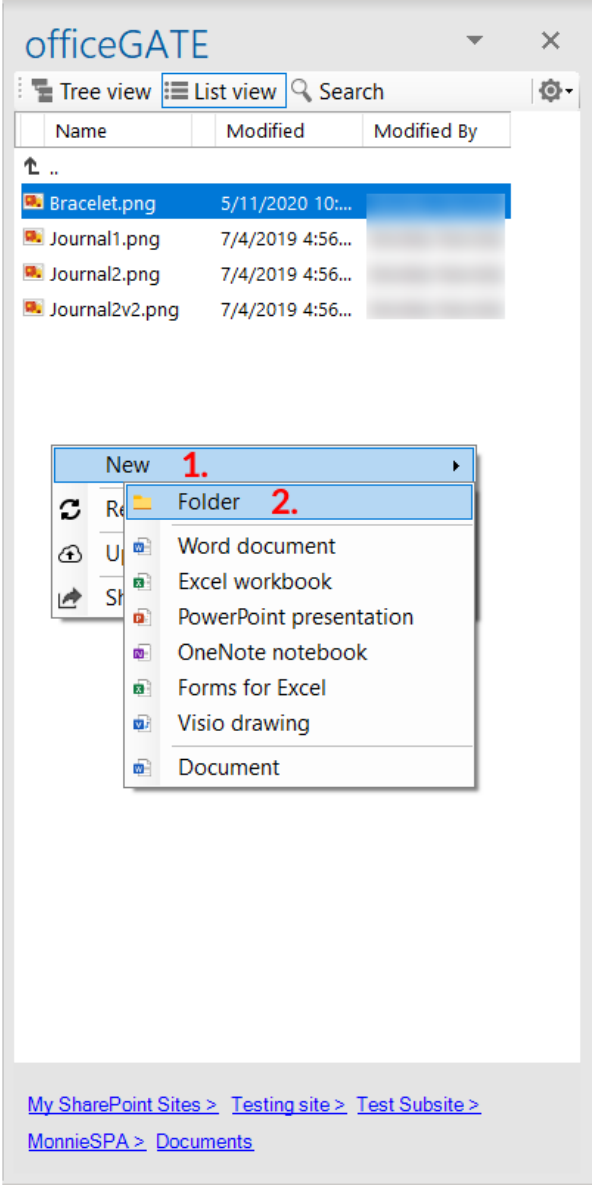


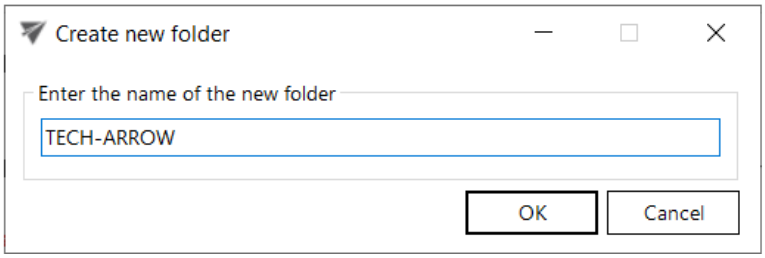




Second way works for **MySharePoint Sites** only. First, select **New** (1) from the item's context menu (or switch to list view and right click into the navigation pane). Then select **Folder** (2) from the available options. The **Create new folder** dialog opens. Type in the folder's name and click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

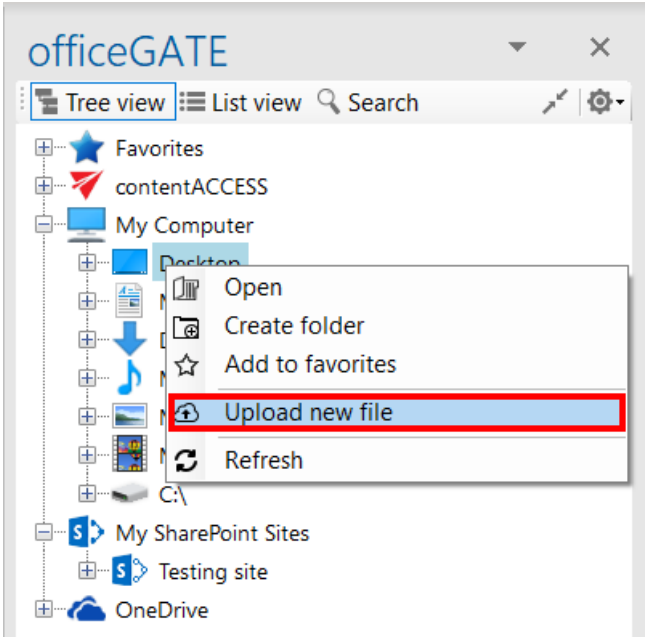






Uploading new file(s)

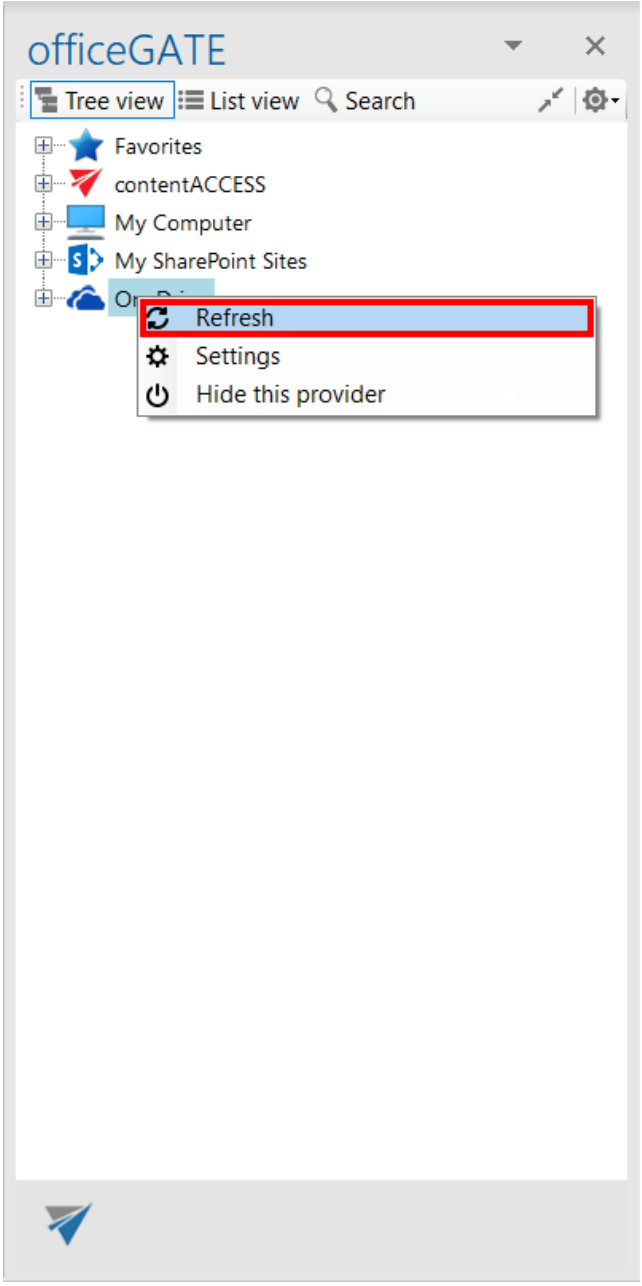
The user may upload new files into the selected folder/library from the folder's/library's context menu. Open the context menu, select **Upload new file** from the menu, browse for the desired document and wait until the upload process has ended.

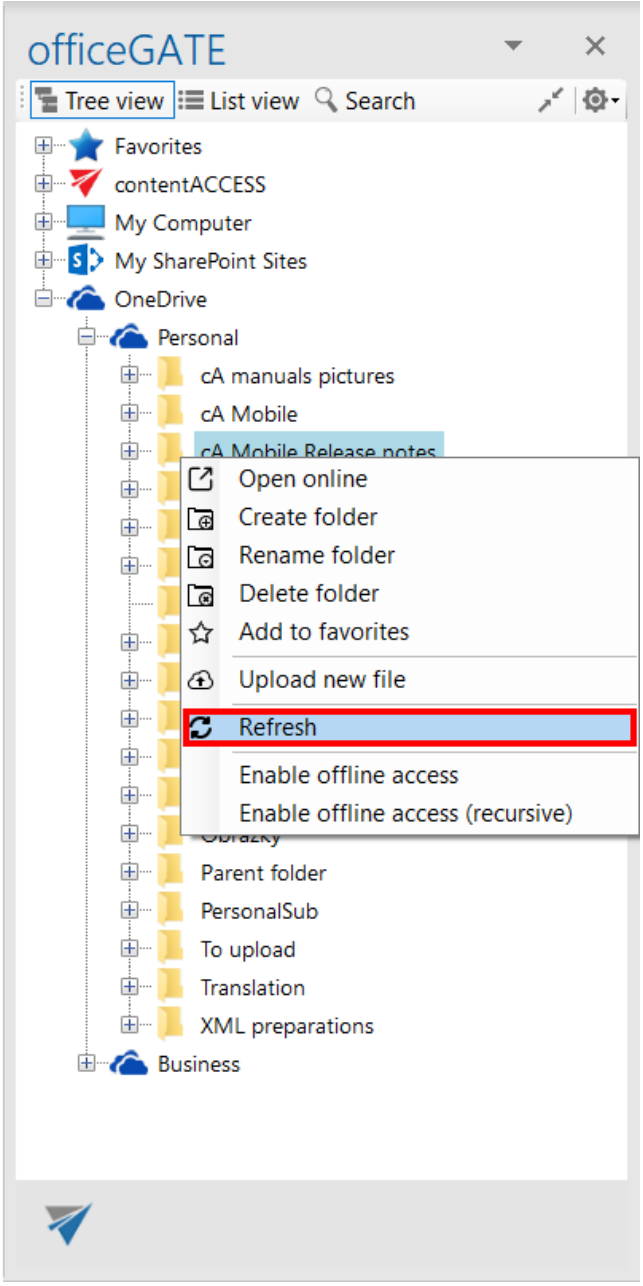


Uploading a file from the tree view

Folder refresh/provider refresh

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





Sharing files 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.

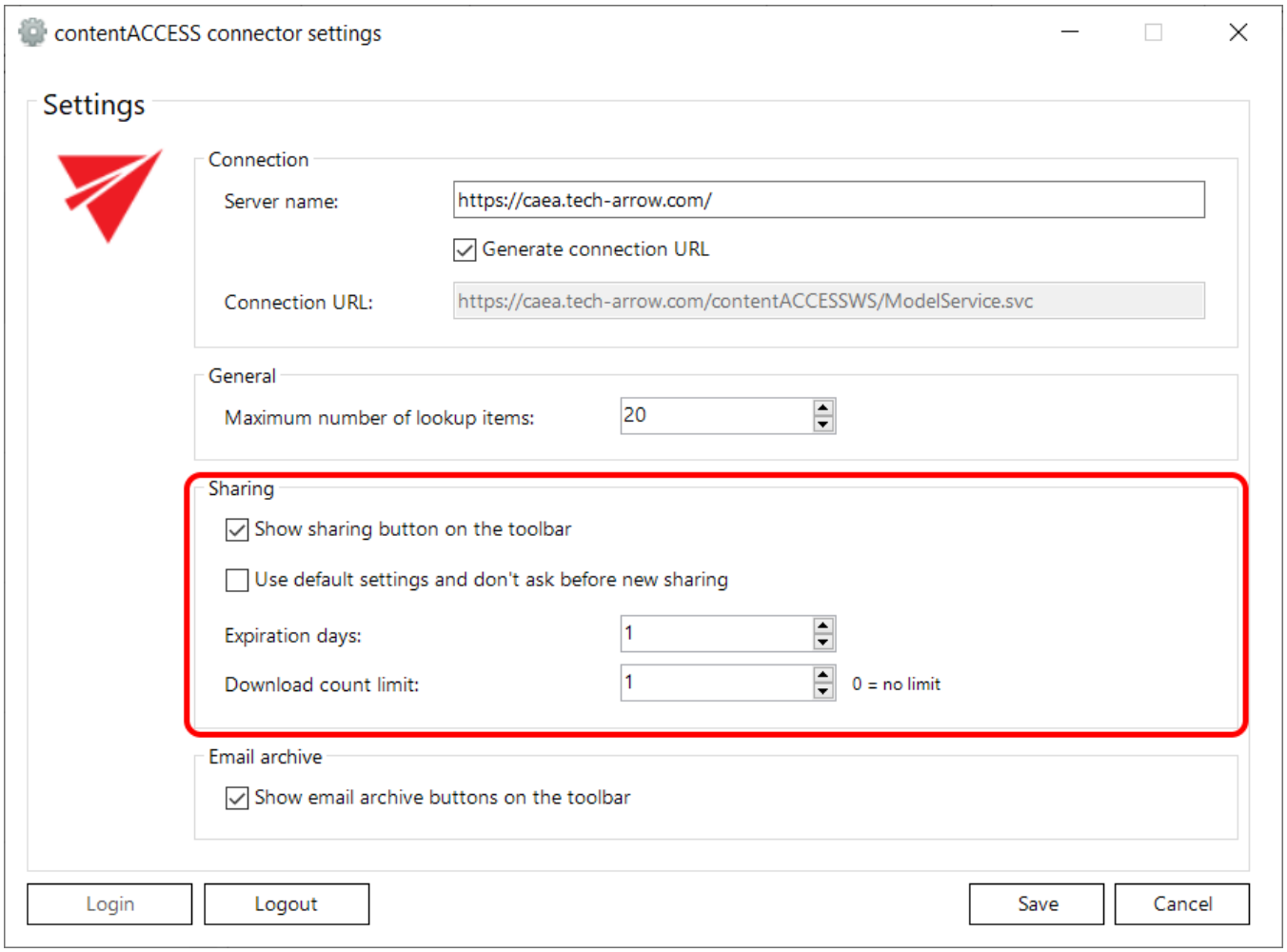
Note: The sharing feature is available only in case that you use contentACCESS provider and the Sharing plugin is licensed.

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

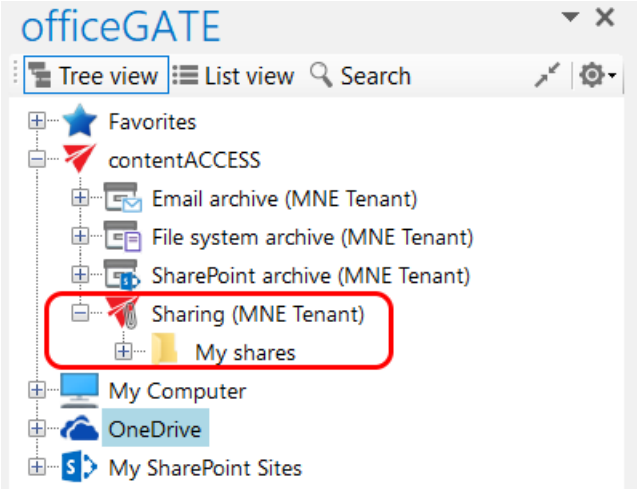
1. **Configure a "Sharing" job in contentACCESS.** A "Sharing" job can be configured in the Custom plugins section (***Custom plugins*** → ***General*** → ***Jobs***) in the Central Administration interface of contentACCESS (more information here).

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).

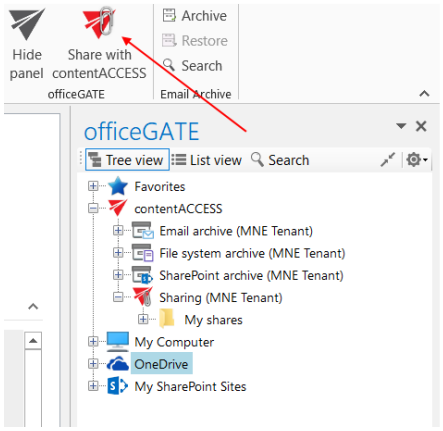


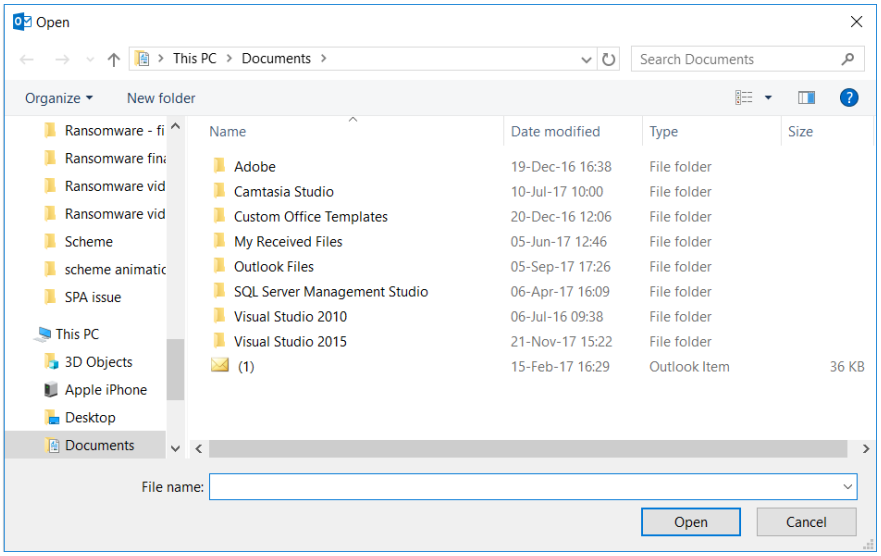
After successful connection expand the contentACCESS node. The sharing plugin is located under contentACCESS node in the officeGATE pane. The shared files will be saved into the folder located under this node.



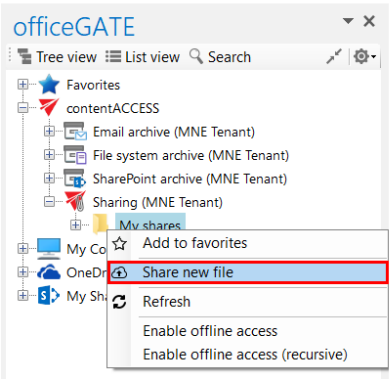
4. If contentACCESS is connected with officeGATE, **you can share files**.There are 2 options how to do it:

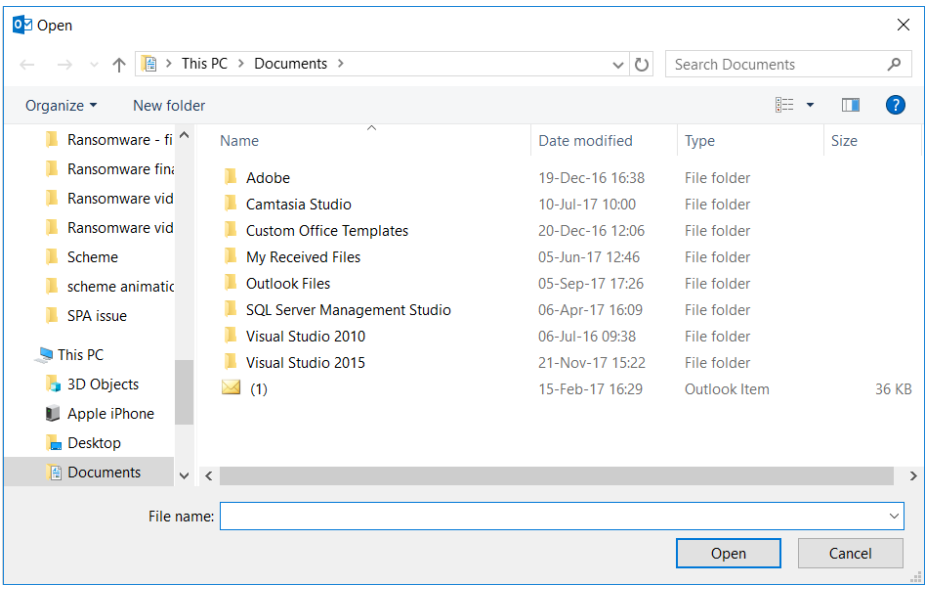
a) **From the toolbar**: Click on the "Share with contentACCESS" button in the MS Outlook toolbar and locate the file that needs to be shared. Click "Open". The main advantage of this first option is, that the user does not have to locate the Sharing plugin in the pane.





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

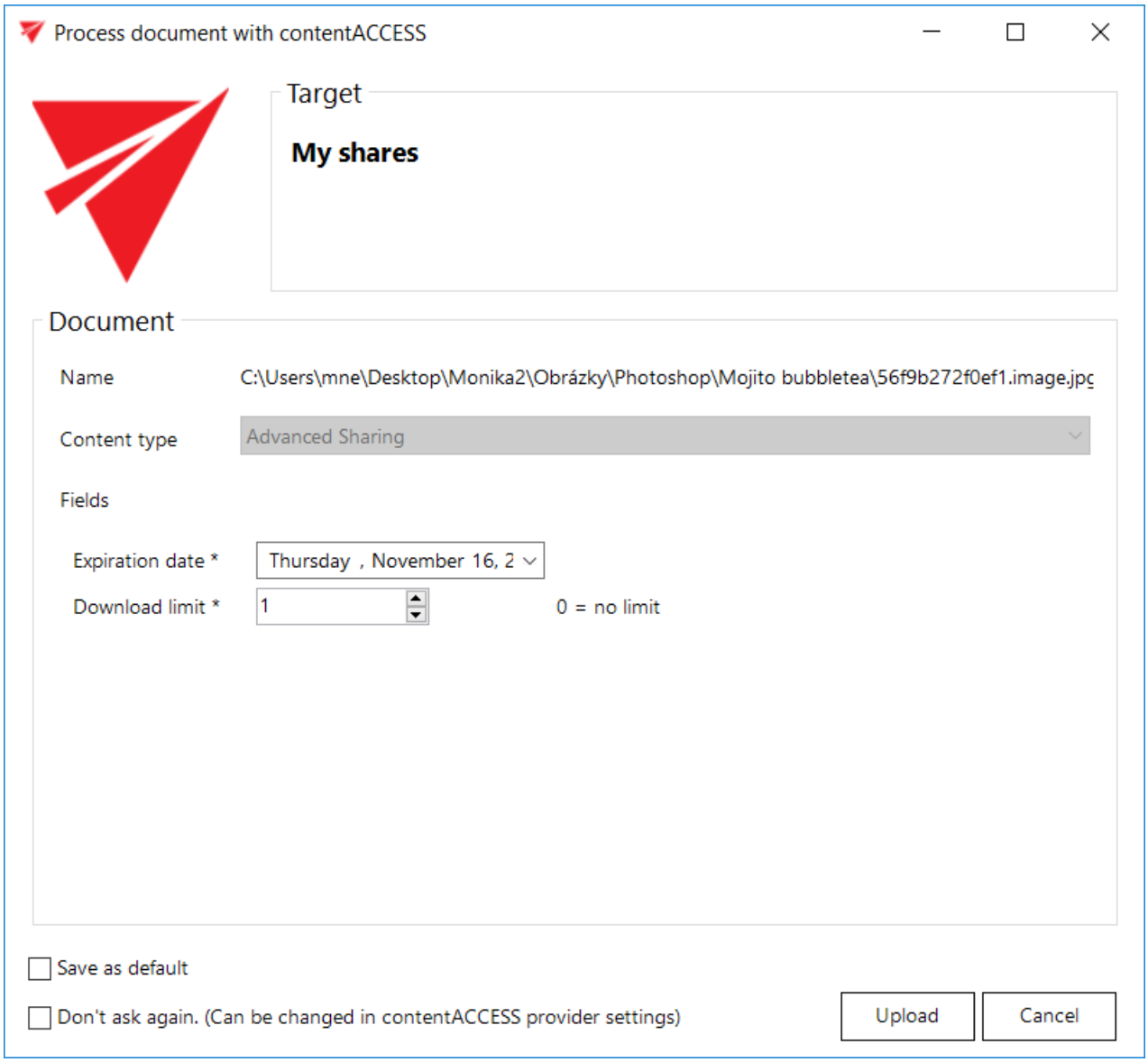




5. The "Process document with contentACCESS" dialog will open automatically. The user may change here the

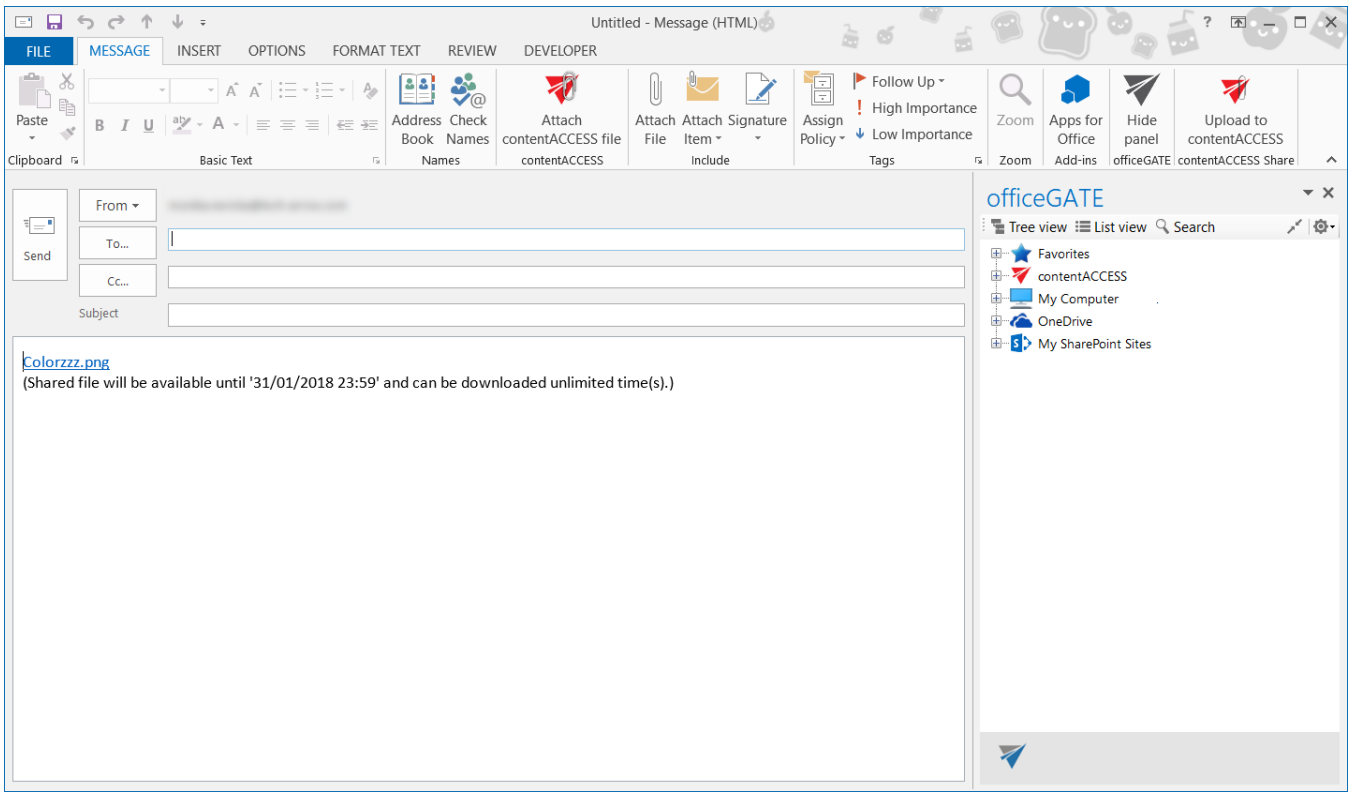
- **Expiration date** – the time period of keeping the file in the **My shares** folder
- **Download limit** – the maximum number of downloads

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.



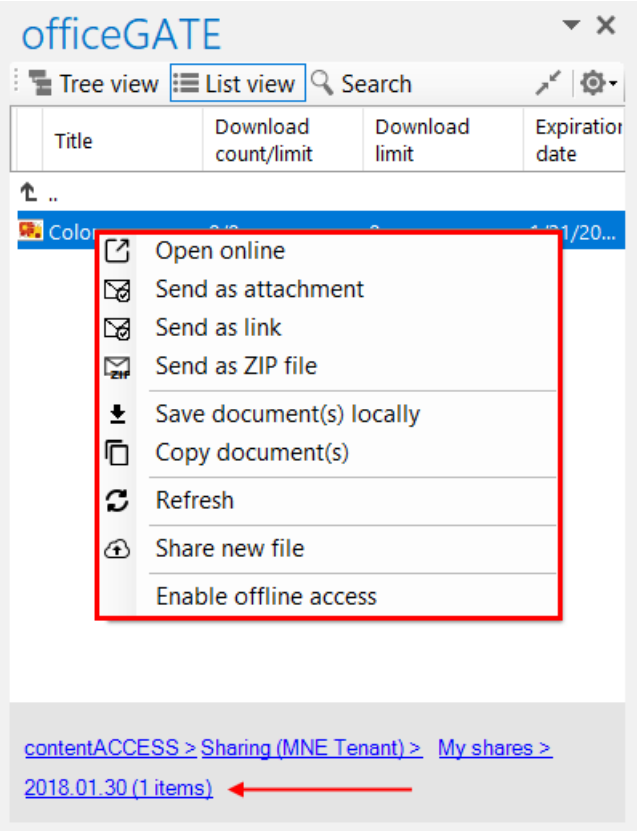
You may change the default expiration date and download count directly in this dialog, too. Simply enter the desired values into the text boxes, check the “Save as default” checkbox in the down left corner and upload the file. The newly specified values will be applied by each new upload. With checking 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.



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:



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.

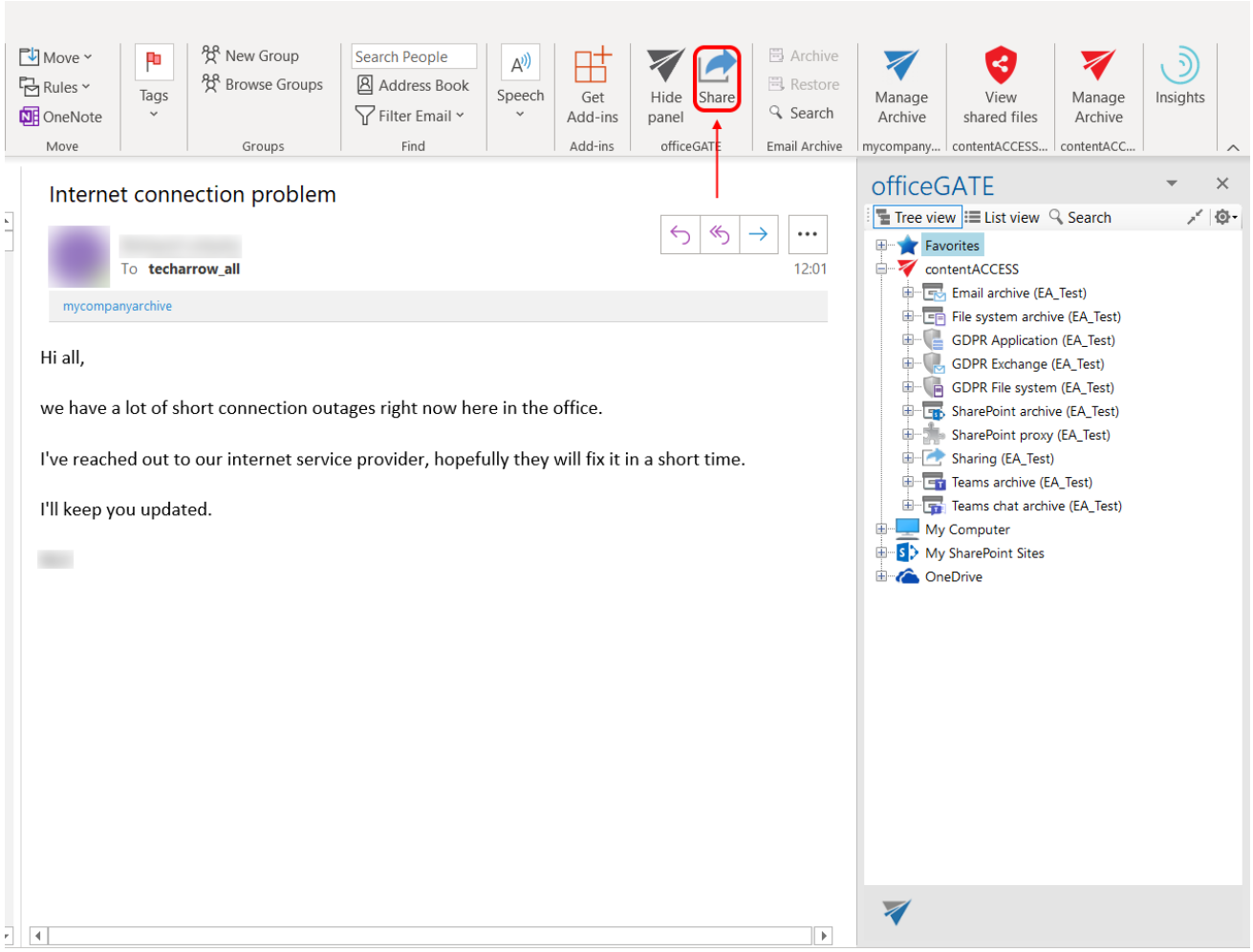
The following steps must be done before using the **Share** function using officeGATE:

1. **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).

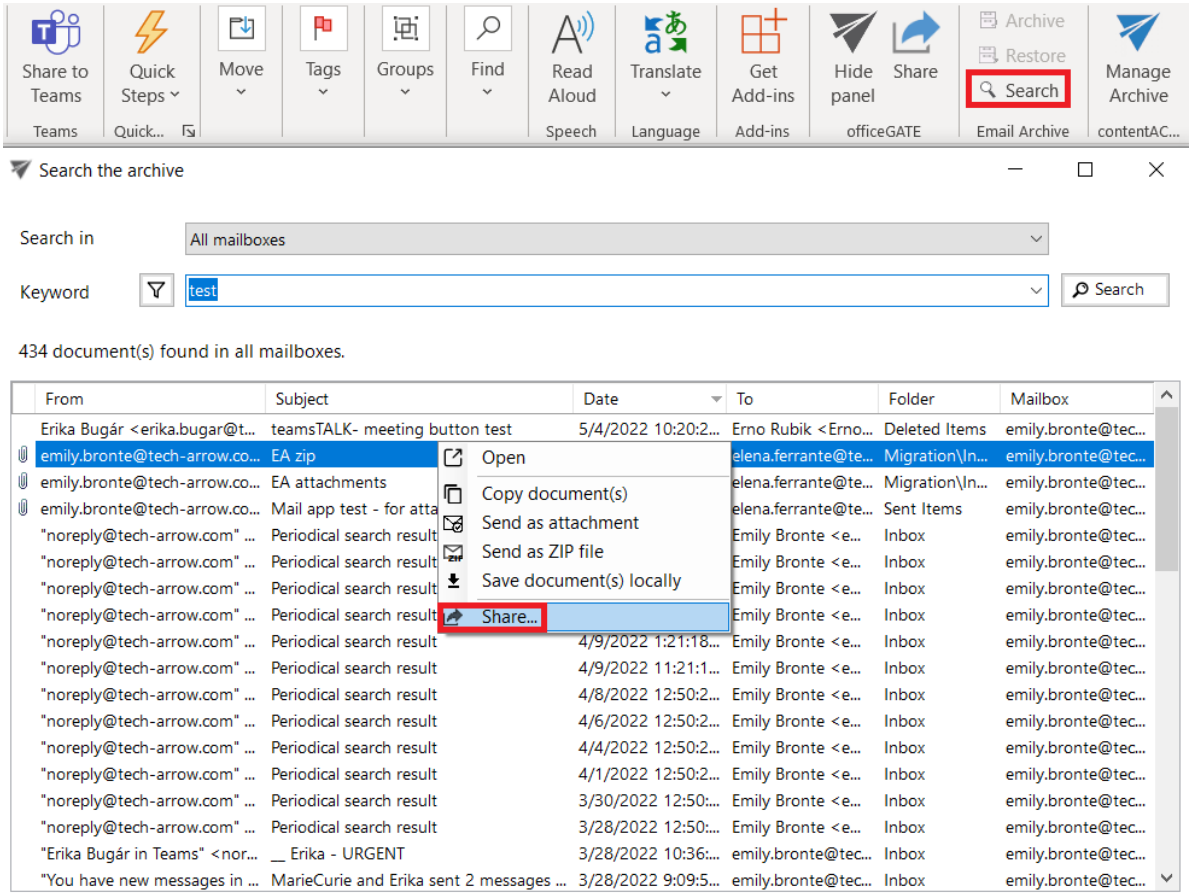
2. **Configure the Sharing settings in contentACCESS.** The Sharing settings can be configured in ***System → Services → Sharing settings***, in the Central Administration interface of contentACCESS (more information here).

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):

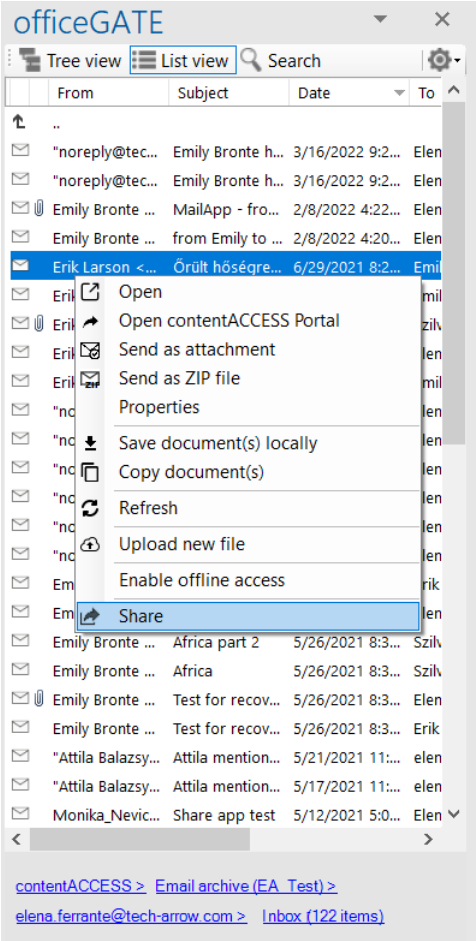
1. **The Share button in the toolbar**



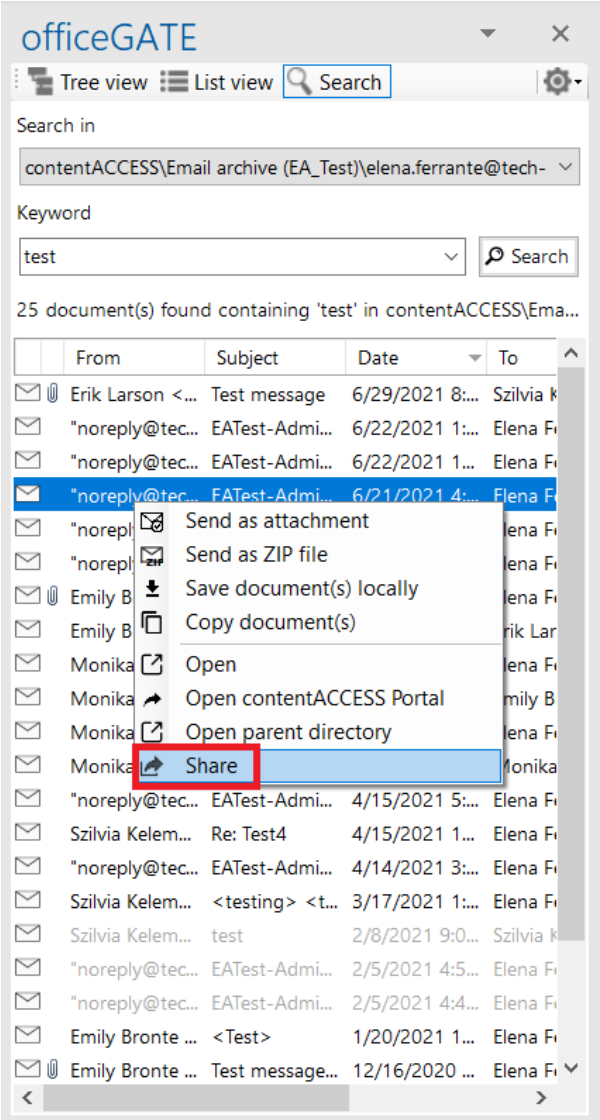
2. **From the context menu of the search results when using the Email archive buttons**



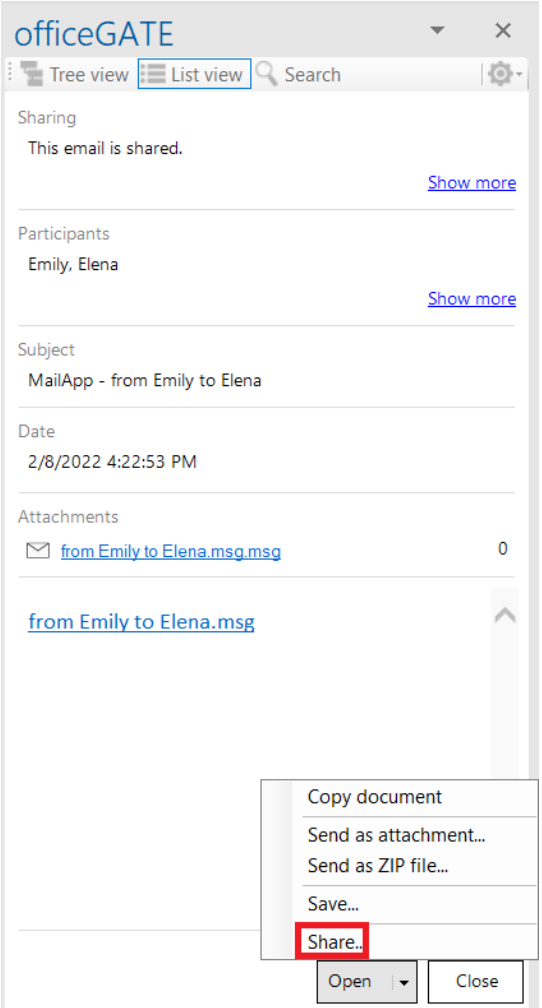
3. From the context menu of the items in List view



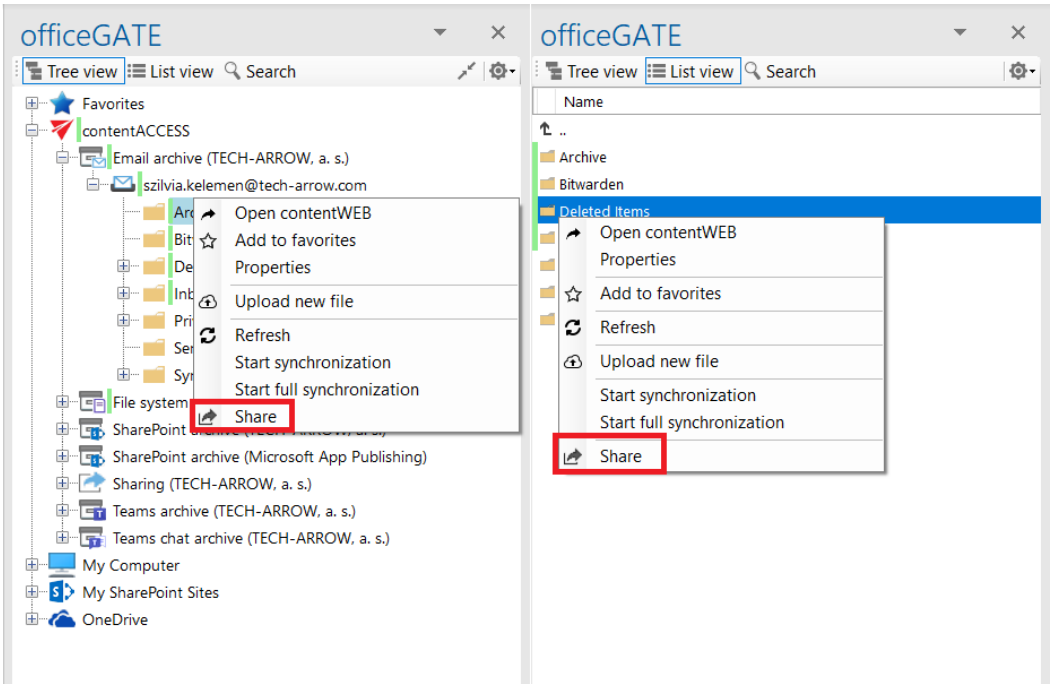
4. From the context menu of the search results



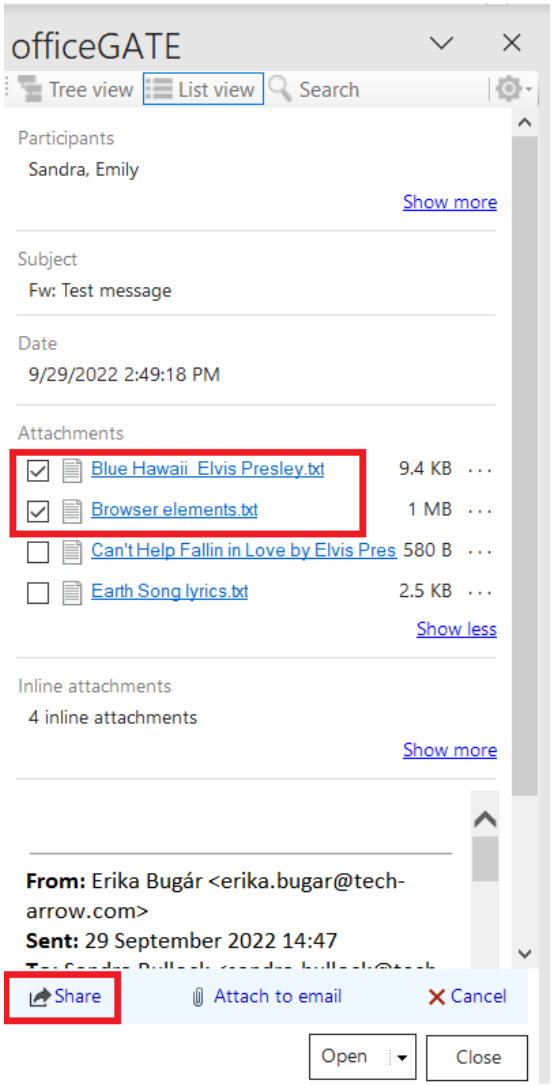
5. **Via the Share option when viewing the Properties of an item**



6. Share folders from the context menu of the folders in Tree view and List view



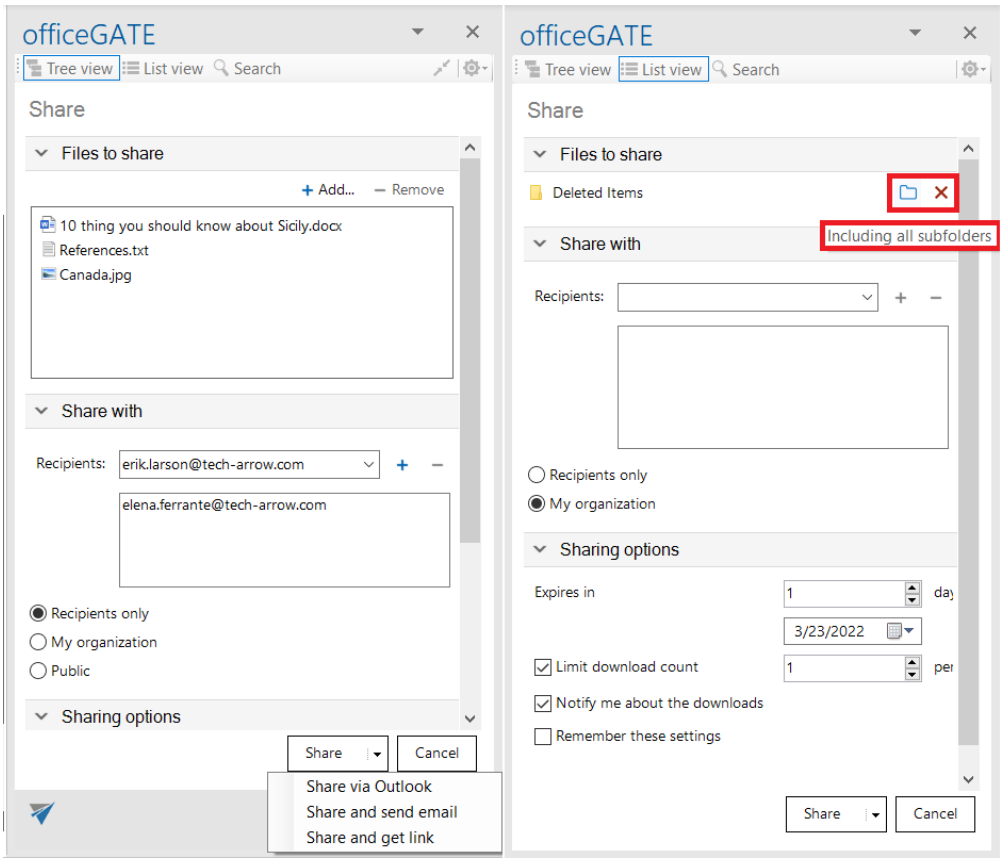
7. Share attachments from email archive

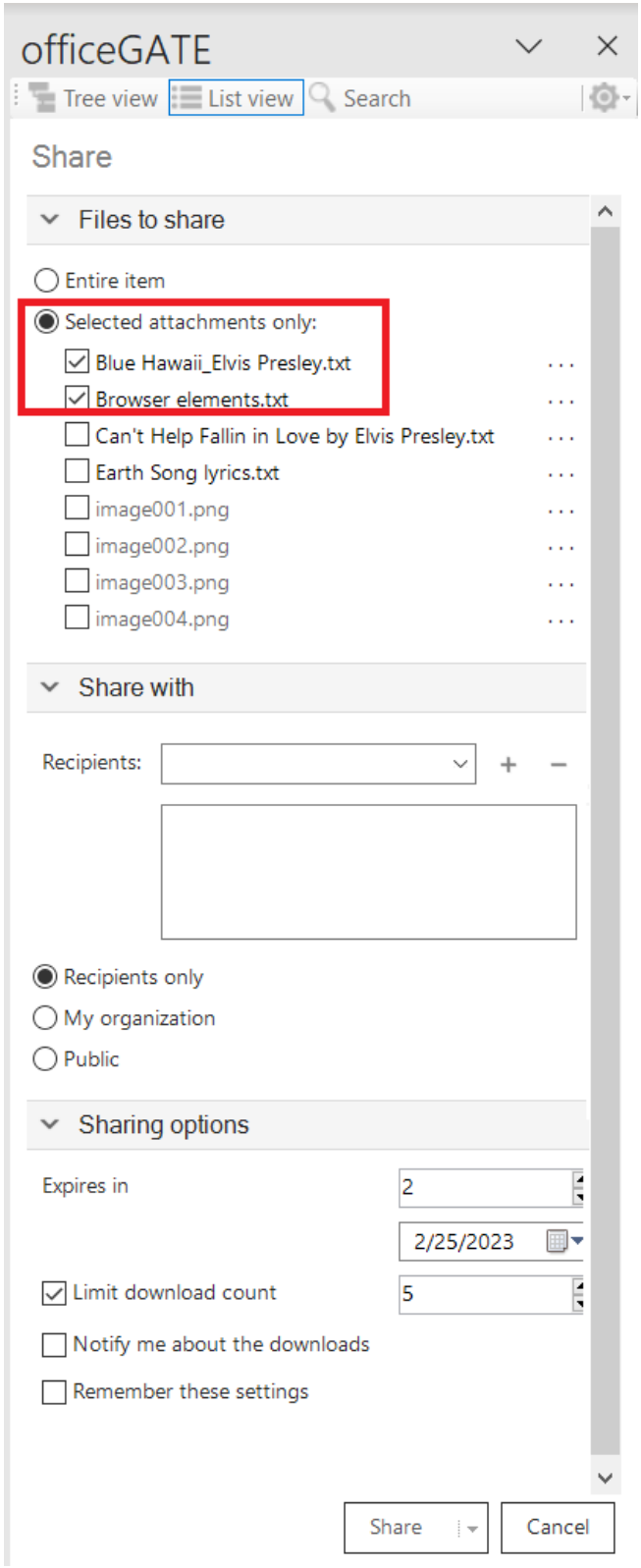


The **Attachment(s)** can be selected from the email preview (multiselection is available). In this case, a **toolbar** appears with the following actions:

- **Share** – the selected item(s) can be shared from the archive
- **Attach to email** – the chosen attachment(s) will be attached to a new email and sent to the set recipients
- **Cancel** – the operation can be canceled with this button, and the selection will be removed from the element(s)

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


officeGATE
Tree view
List view
Search
Share
Files to share
+ Add...
– Remove
10 thing you should know about Sicily.docx
References.txt
Canada.jpg
Share with
Recipients:
erik.larson@tech-arrow.com
elena.ferrante@tech-arrow.com
Recipients only
My organization
Public
Sharing options
Share
Cancel
Share via Outlook
Share and send email
Share and get link
officeGATE
Tree view
List view
Search
Share
Files to share
Deleted Items
Including all subfolders
Share with
Recipients:
Recipients only
My organization
Sharing options
Expires in
1
day
3/23/2022
Limit download count
1
per
Notify me about the downloads
Remember these settings
Share
Cancel



Screenshot: Share attachment from email preview

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)

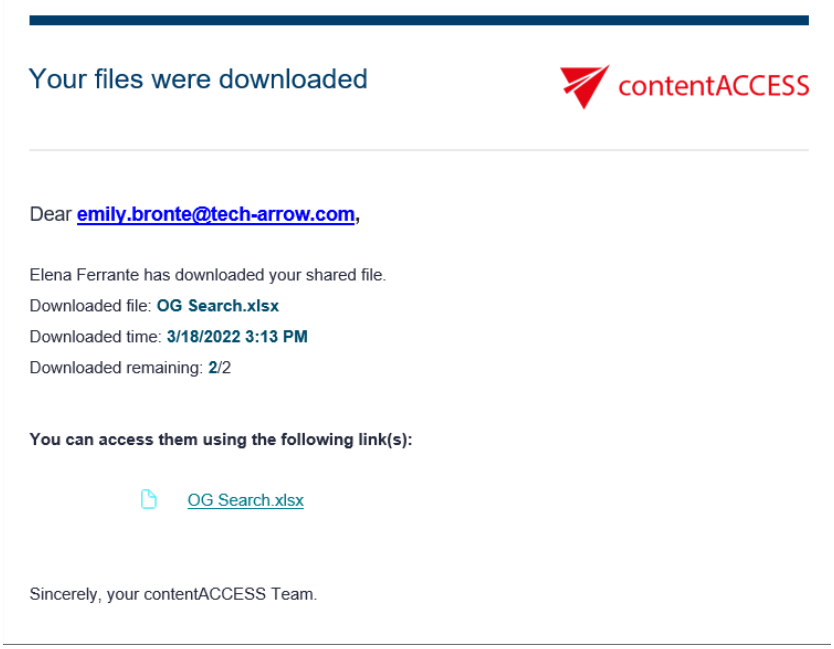
In section **Options**, specify how many days do you want the item(s) to **expire in** or select the date from the calendar. It is also possible to **limit the number of downloads**, based on the option selected in **Share with**:

- **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



Your files were downloaded

contentACCESS

Dear emily.bronte@tech-arrow.com,

Elena Ferrante has downloaded your shared file.
Downloaded file: **OG Search.xlsx**
Downloaded time: **3/18/2022 3:13 PM**
Downloaded remaining: **2**/2

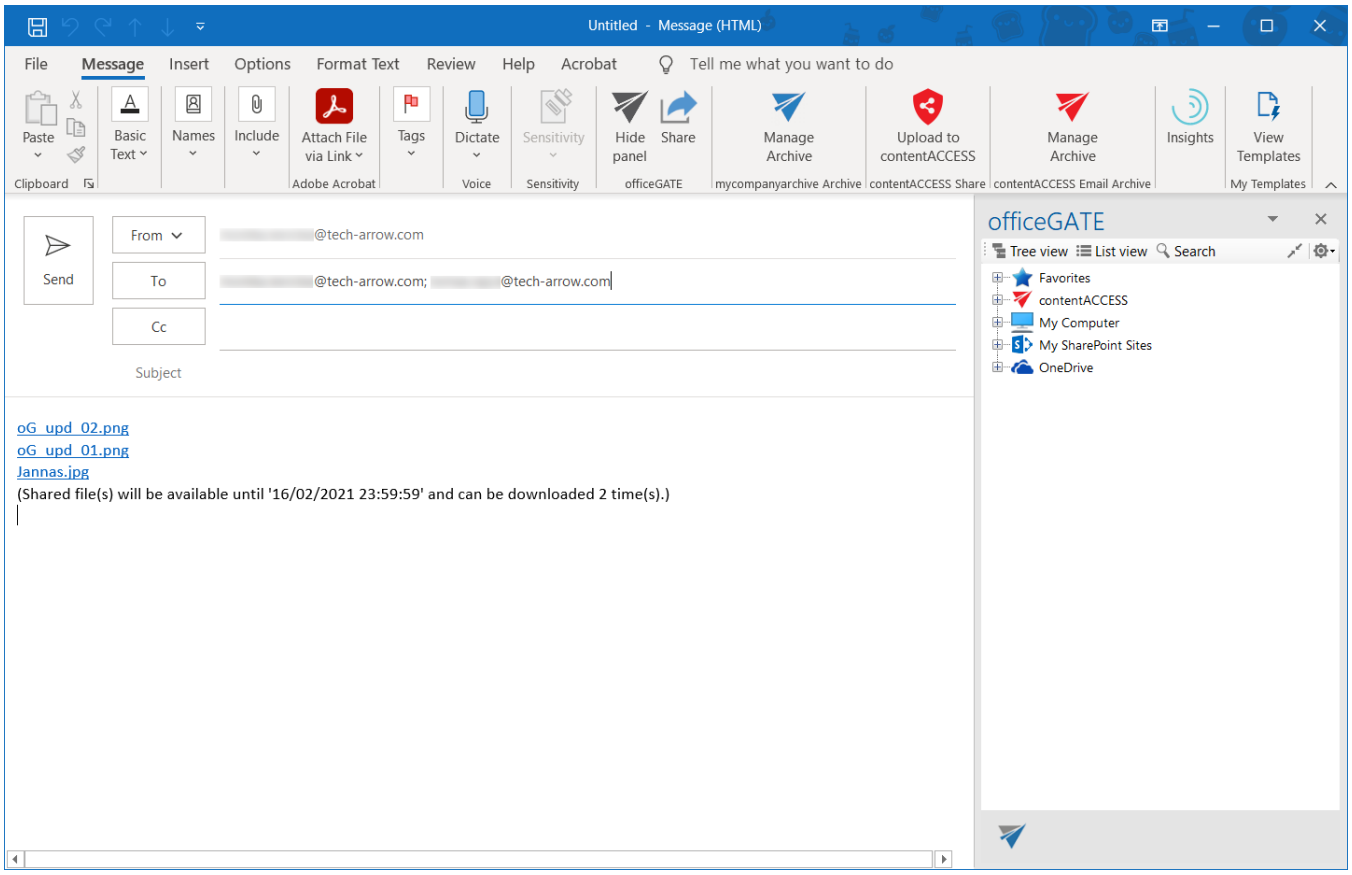
You can access them using the following link(s):

OG Search.xlsx

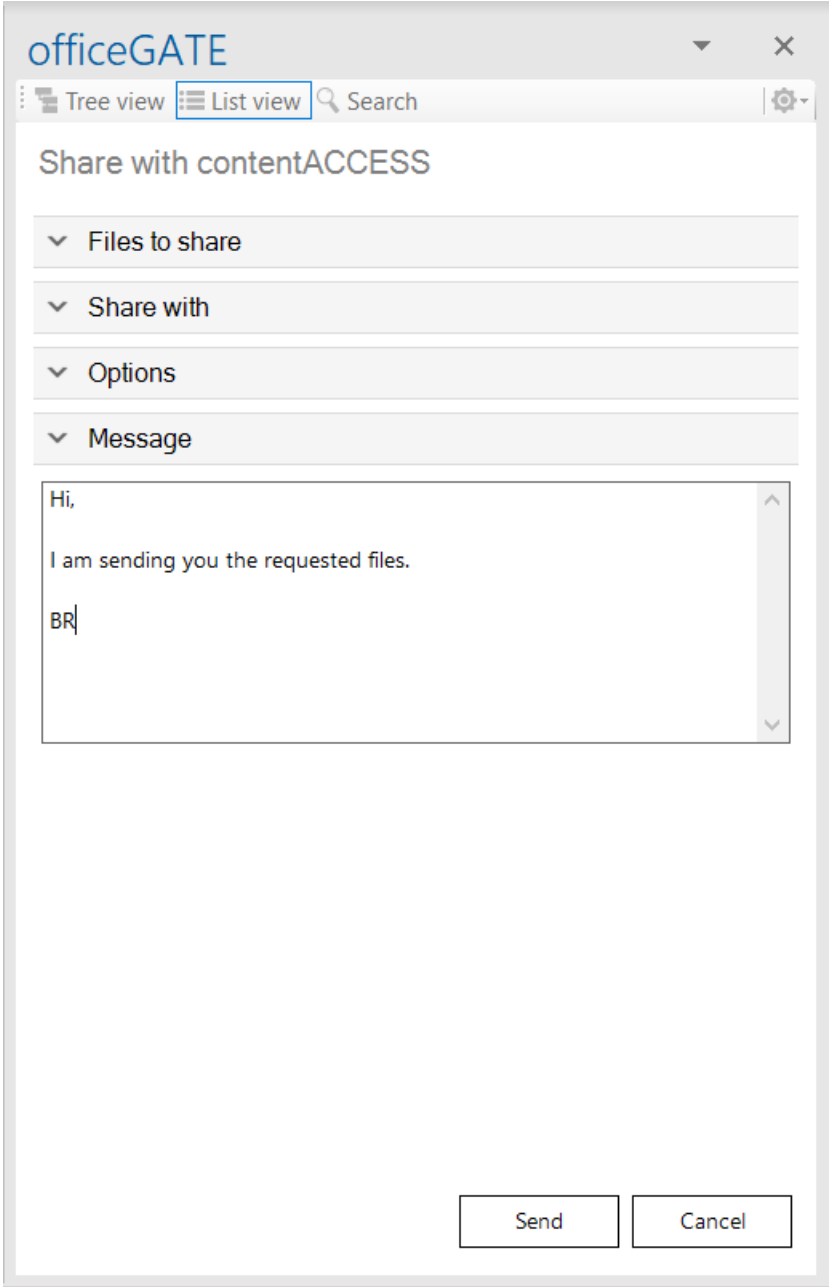
Sincerely, your contentACCESS Team.

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:

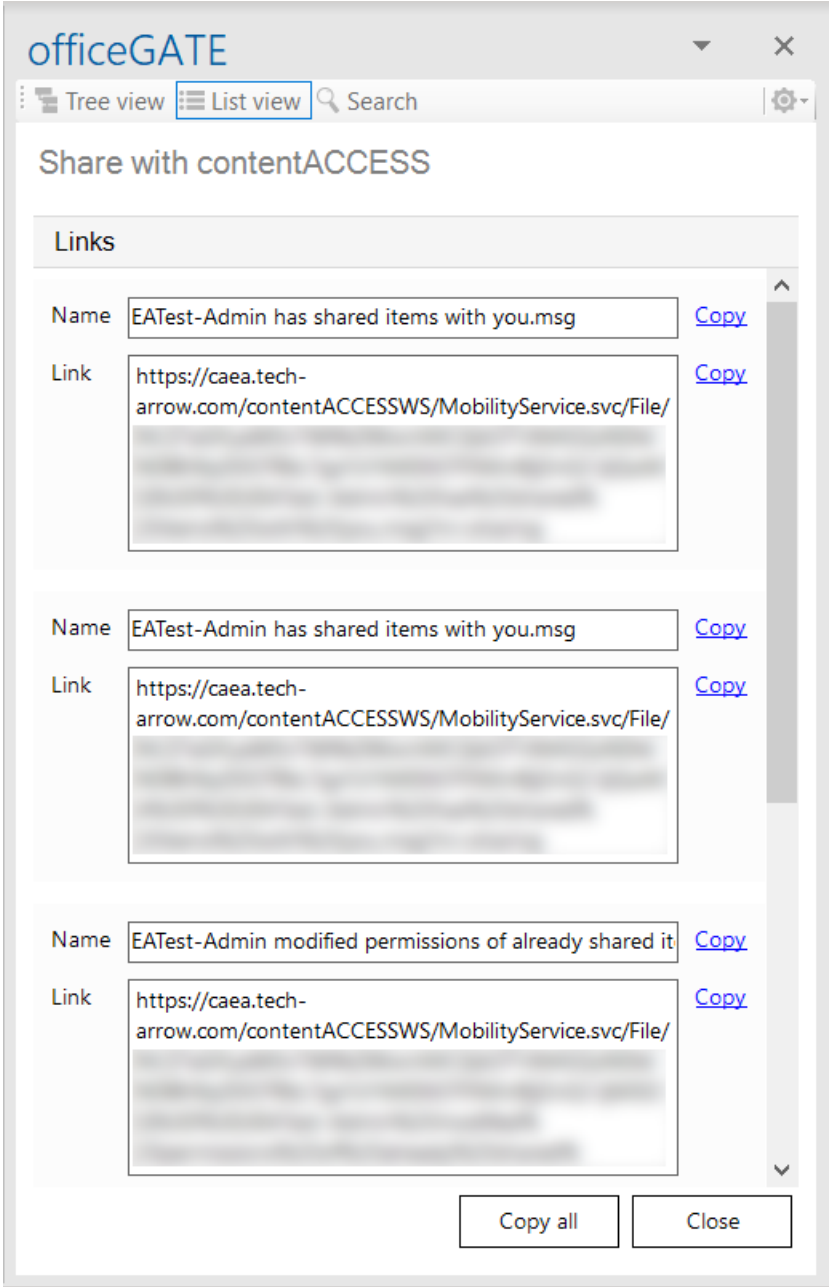
- **Share via Outlook** – links to the shared files are inserted into the body of the email



- **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



- **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

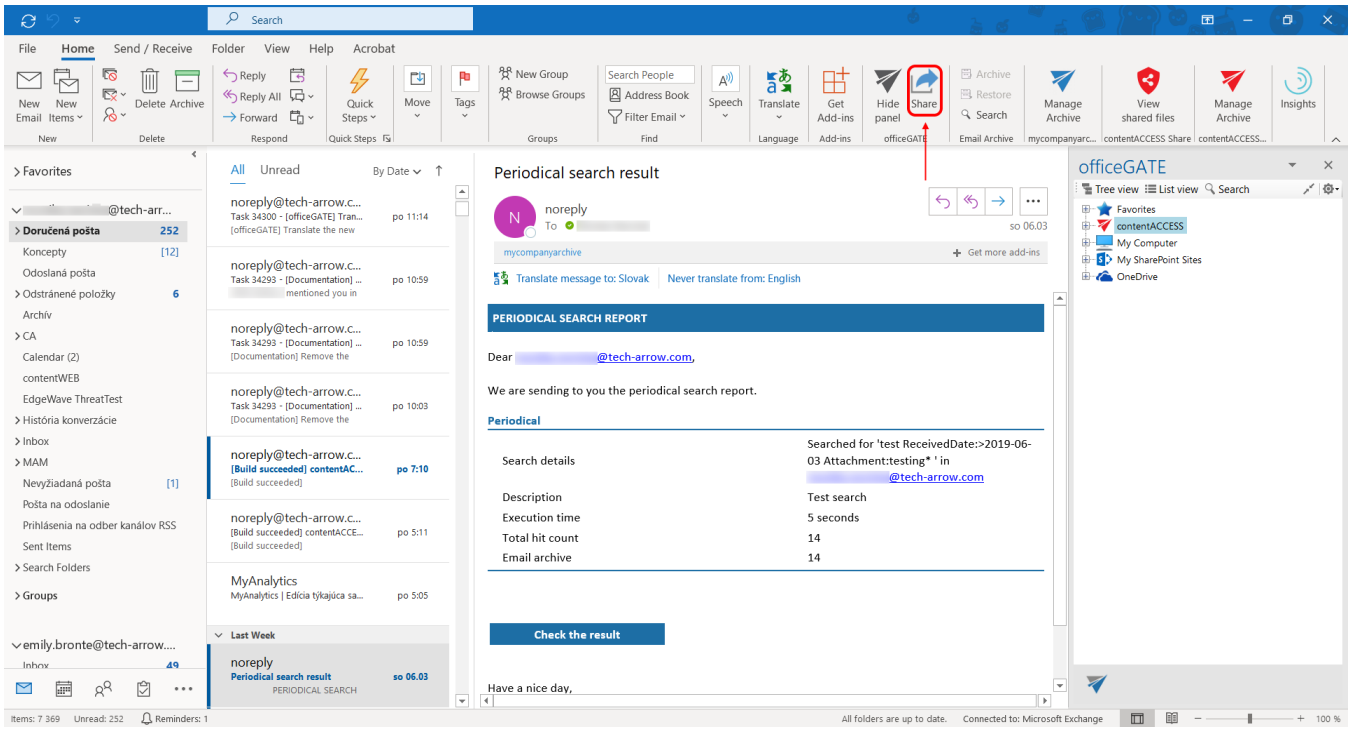


Sharing possibilities

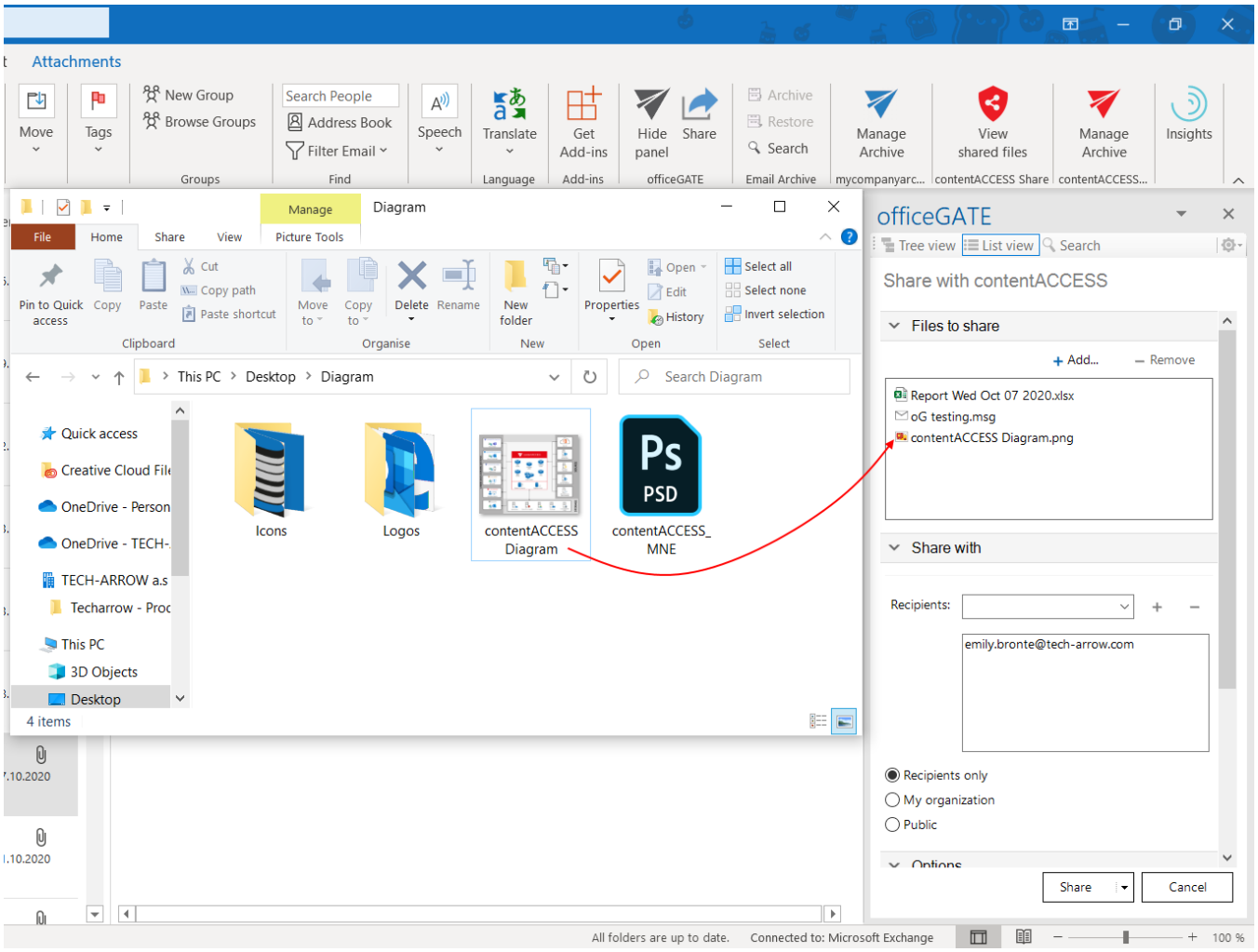
In the section above, we explained where it is possible to find the **Share** option and general sharing details. In this section, we would like to show you more in details how sharing from different places/providers work. In all cases, you must first be **logged in to contentACCESS**.

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.

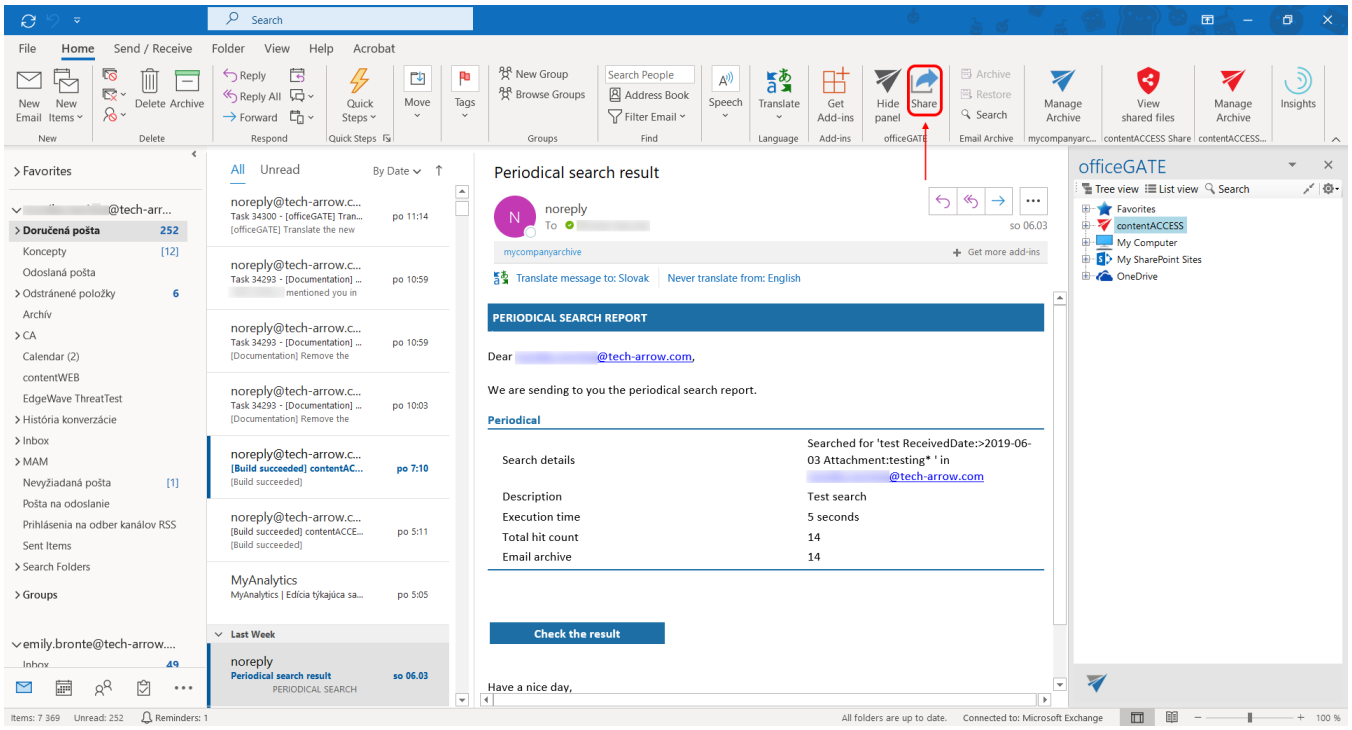


Screenshot: Drag&Drop of a local file

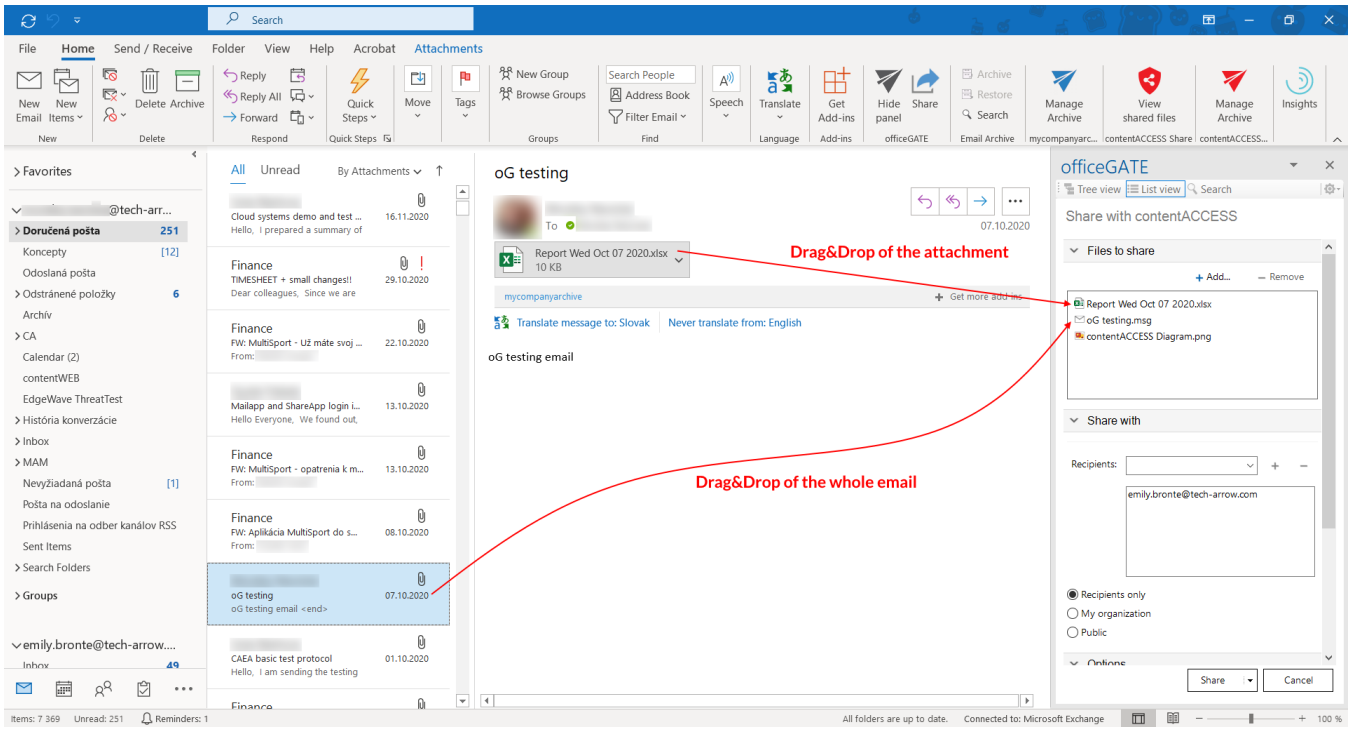
Fill in the rest of the sharing options based on the section above.

Sharing email attachments or whole email/Outlook item

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



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



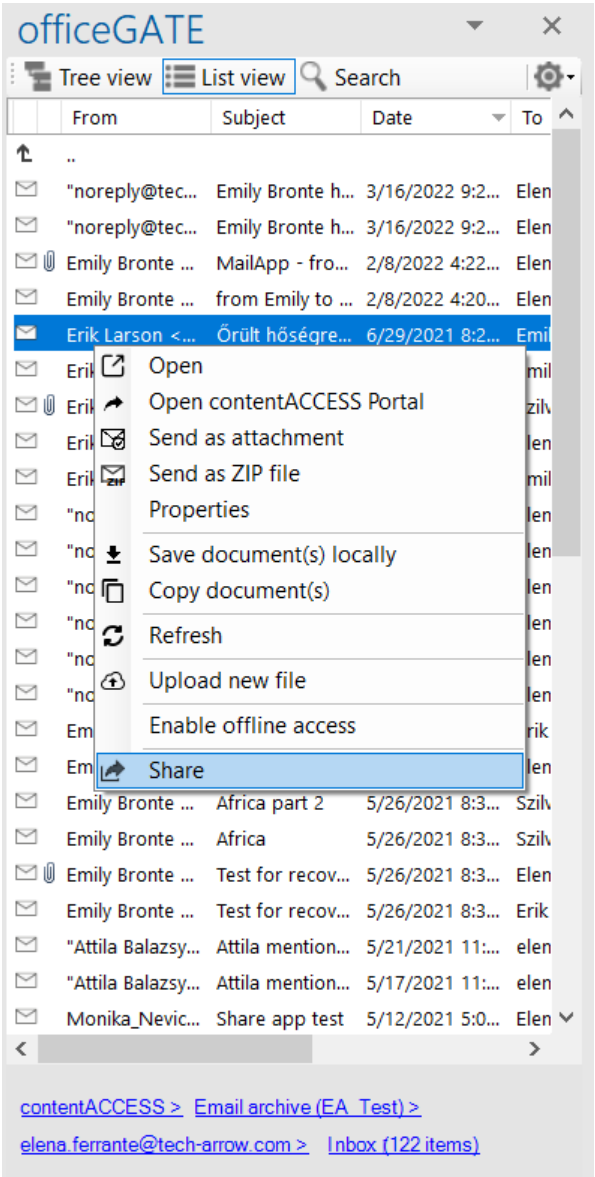
Screenshot: Drag&Drop of the whole email and just the attachment

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

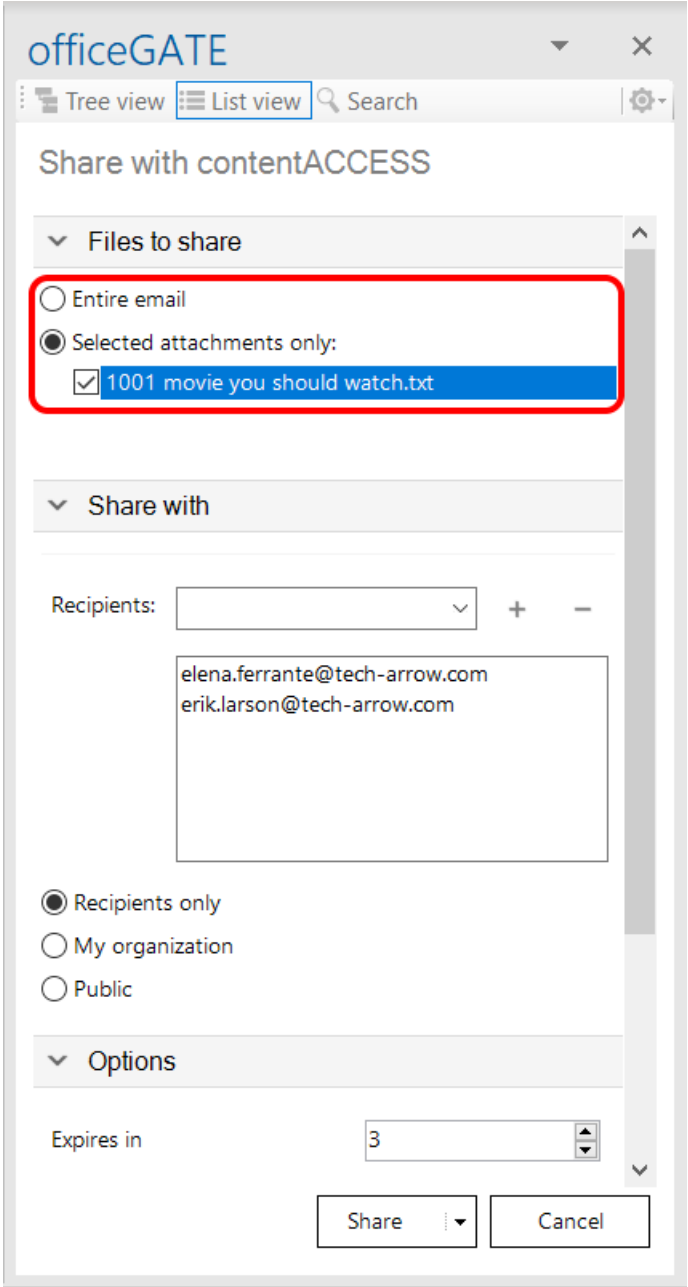
Sharing from contentACCESS archive

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.



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



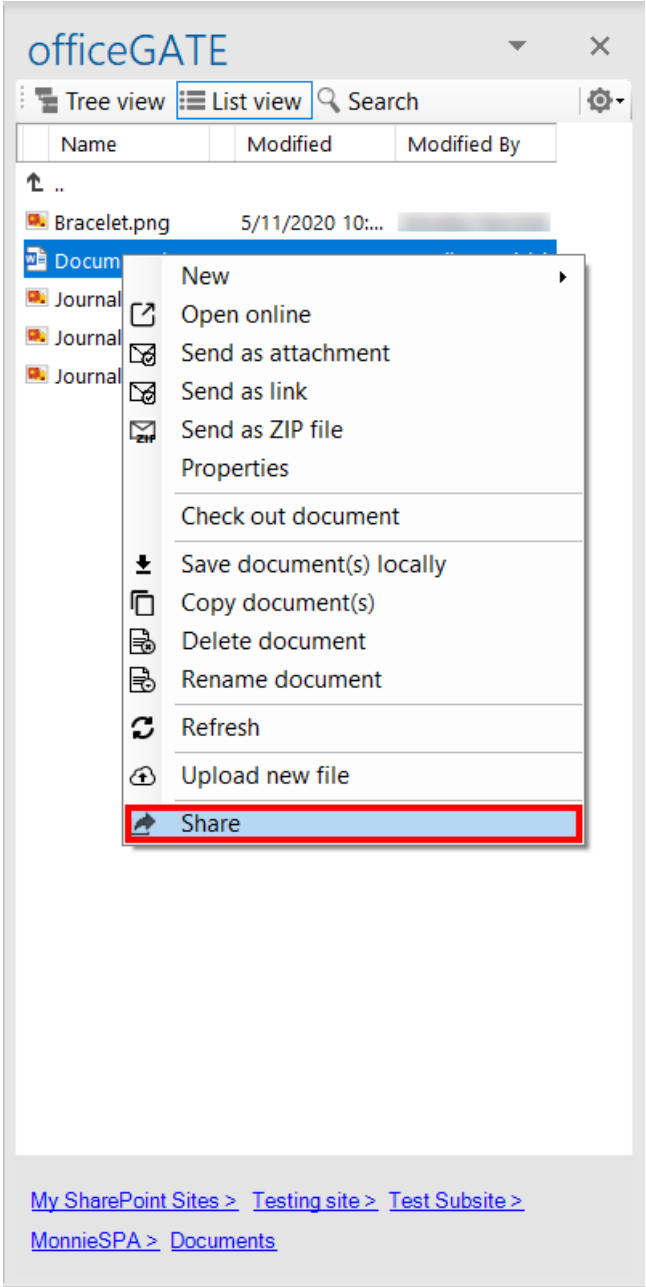
Fill in the rest of the sharing options based on the section above.

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 Central Administration, 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.



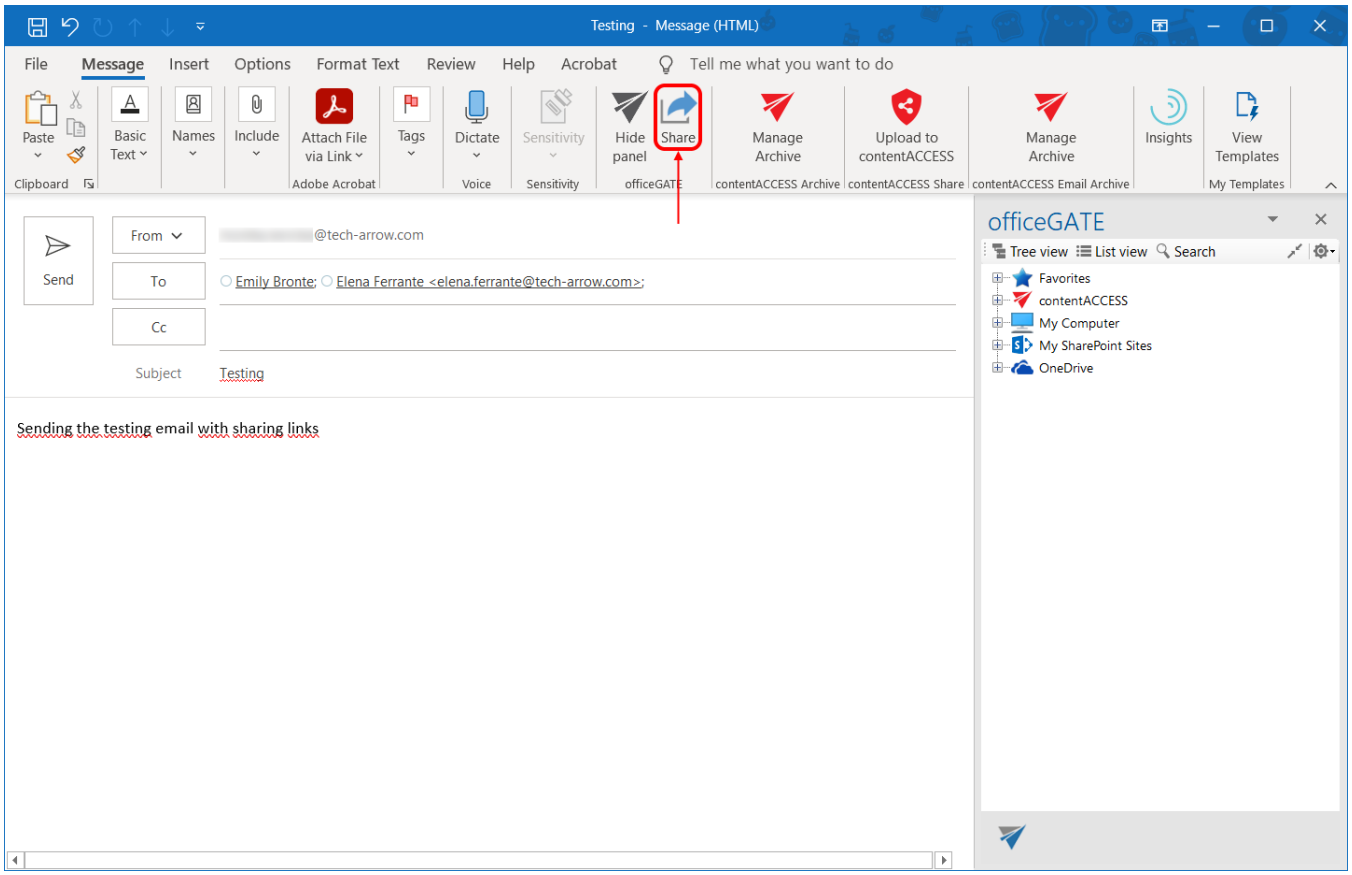
Screenshot: Sharing from My SharePoint Sites

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

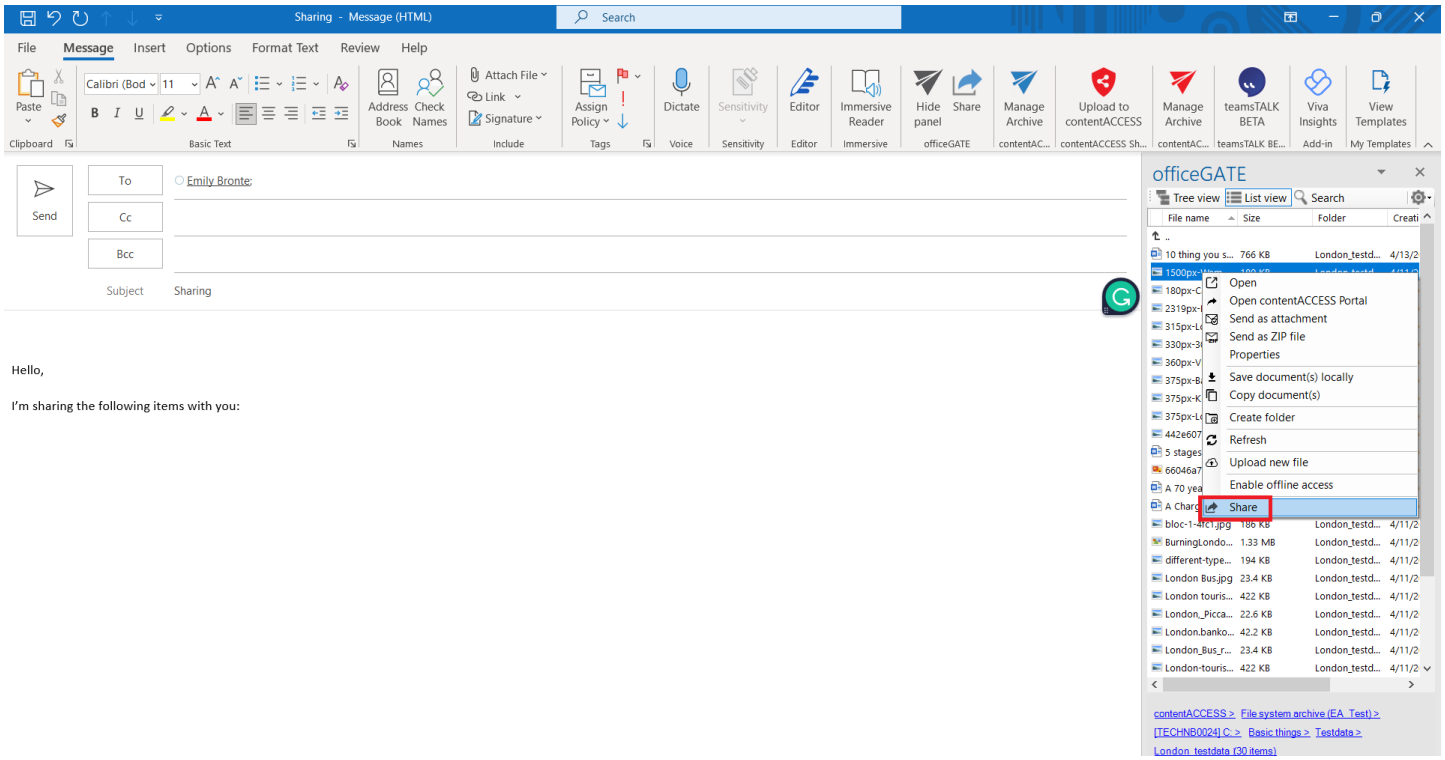
Creating an email with Sharing

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

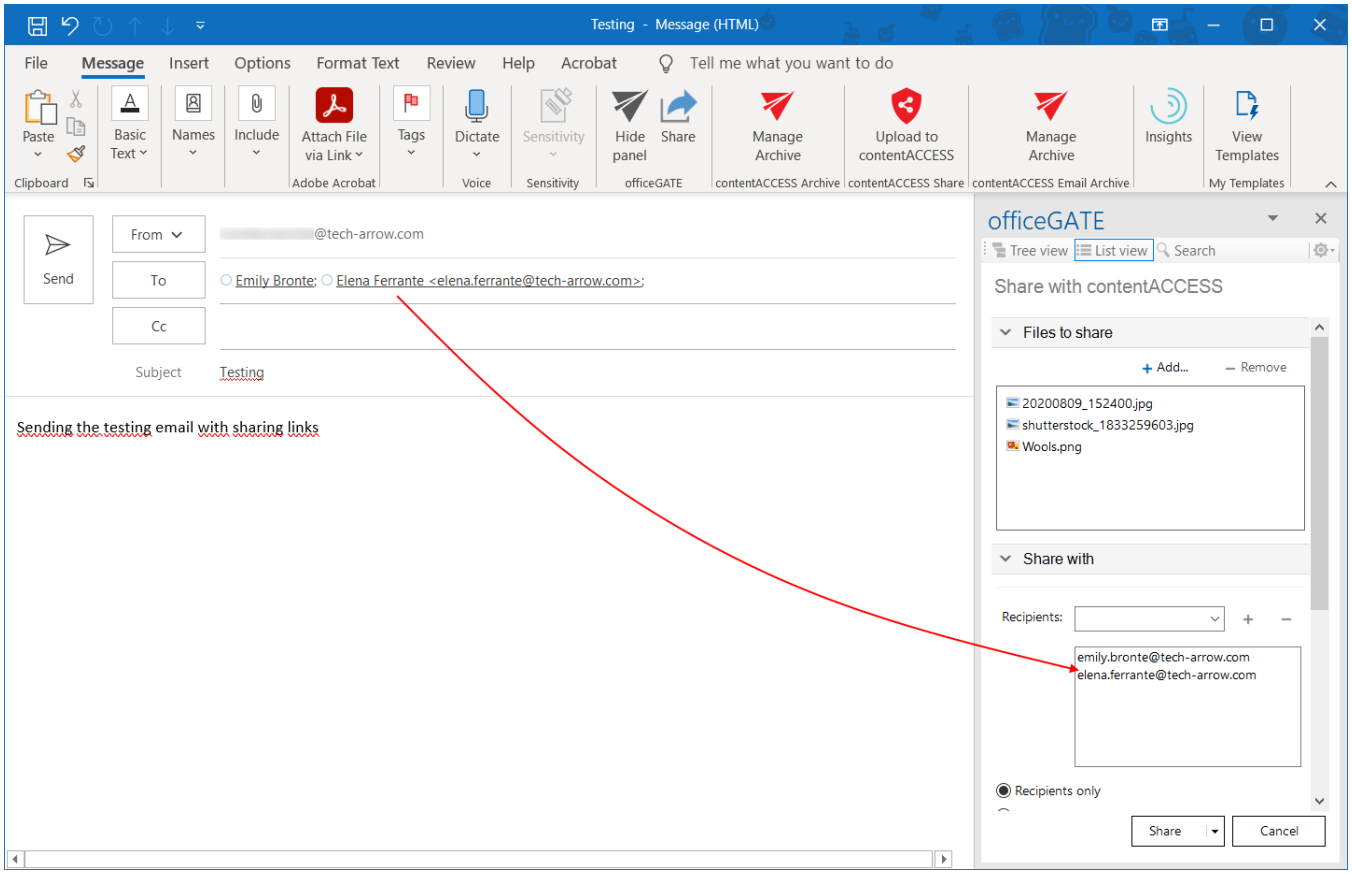
1. Click on the **Share** button in the toolbar and then browse local files after clicking on the **+Add** button in the section **Files to share**, or **Drag&Drop** files to the field.



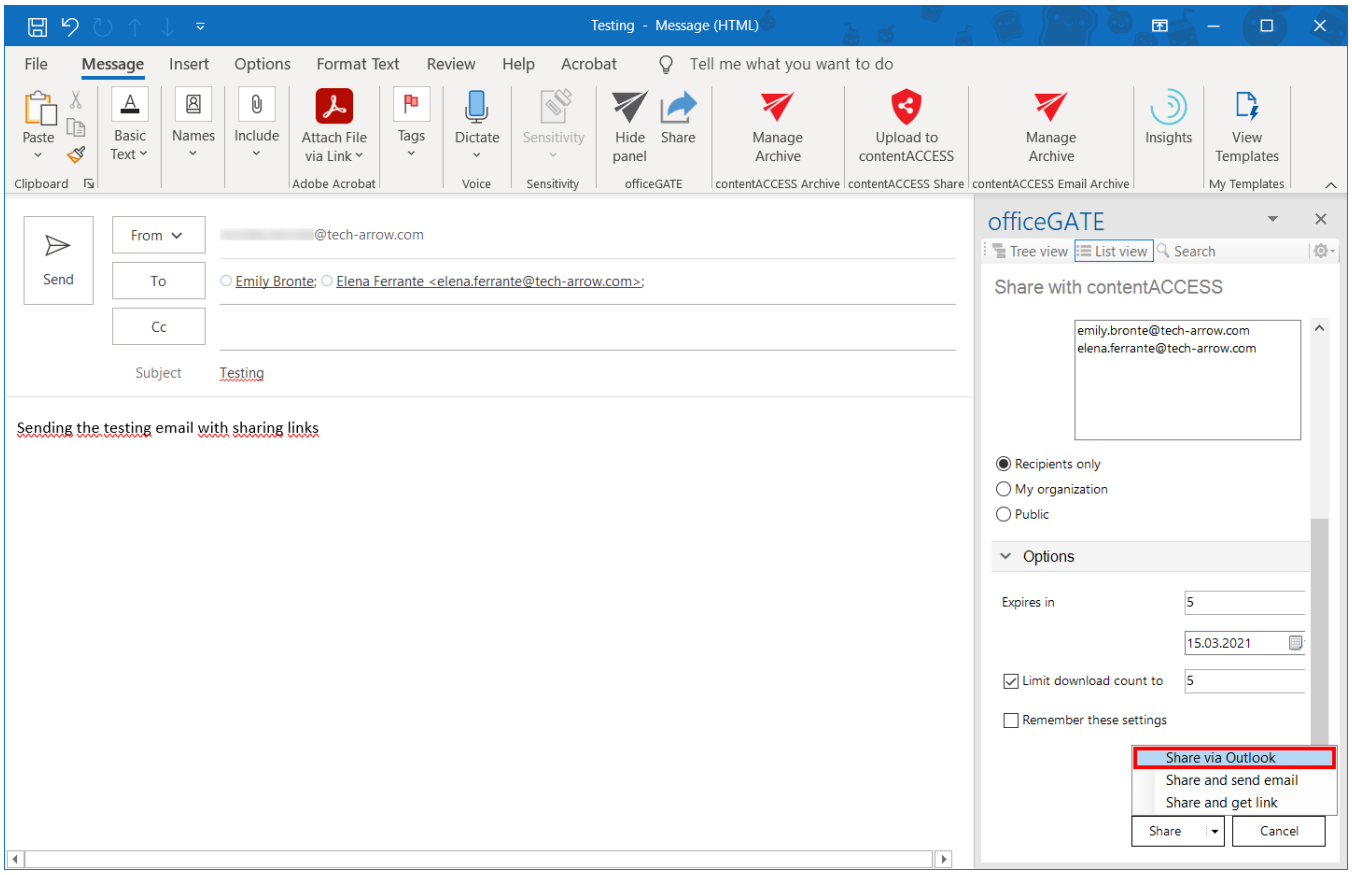
2. In the officeGATE pane, select the item(s) that you would like to share and then pick the **Share** option from the context menu.


Sharing - Message (HTML)
Search
File
Message
Insert
Options
Format Text
Review
Help
Paste
Clipboard
Basic Text
Address Book
Check Names
Names
Attach File
Link
Signature
Include
Assign Policy
Tags
Dictate
Voice
Sensitivity
Editor
Immersive Reader
Hide panel
Share
officeGATE
Manage Archive
Upload to contentACCESS
Manage Archive
teamsTALK BETA
Viva Insights
Add-in
View Templates
My Templates
Send
To
Emily Bronte;
Cc
Bcc
Subject
Sharing
Hello,
I'm sharing the following items with you:
officeGATE
Tree view
List view
Search
File name
Size
Folder
Open
Open contentACCESS Portal
Send as attachment
Send as ZIP file
Properties
Save document(s) locally
Copy document(s)
Create folder
Refresh
Upload new file
Enable offline access
Share
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.



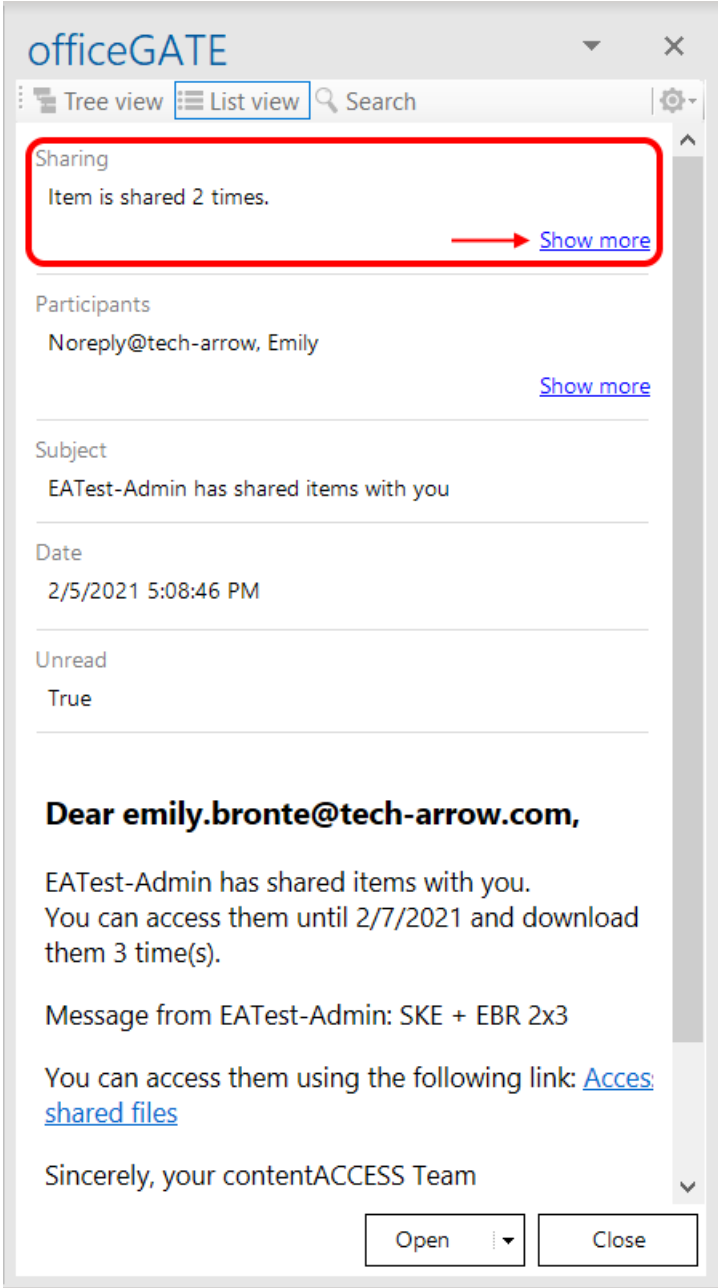
Fill in the rest of the sharing options based on the section above and then click on **Share via Outlook**. The links pointing to the shared items are then inserted into the body of the email, which you can now send.



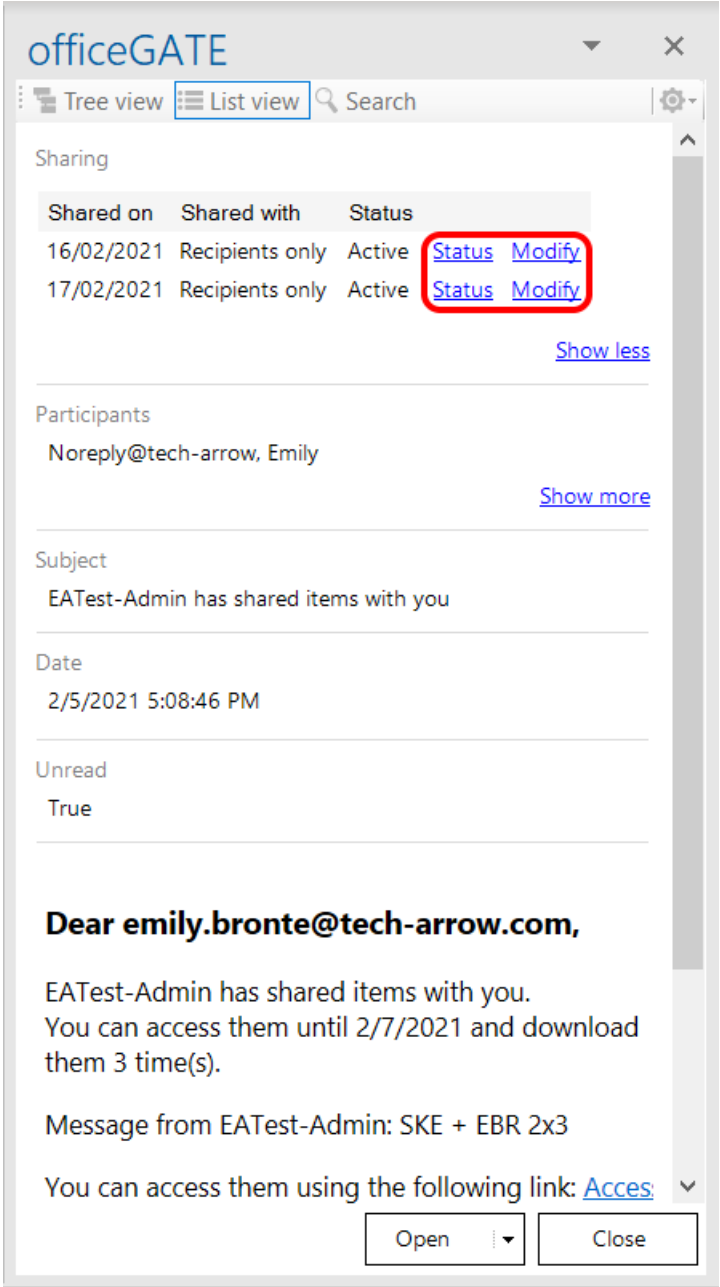
Modifying sharing settings and checking sharing status

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

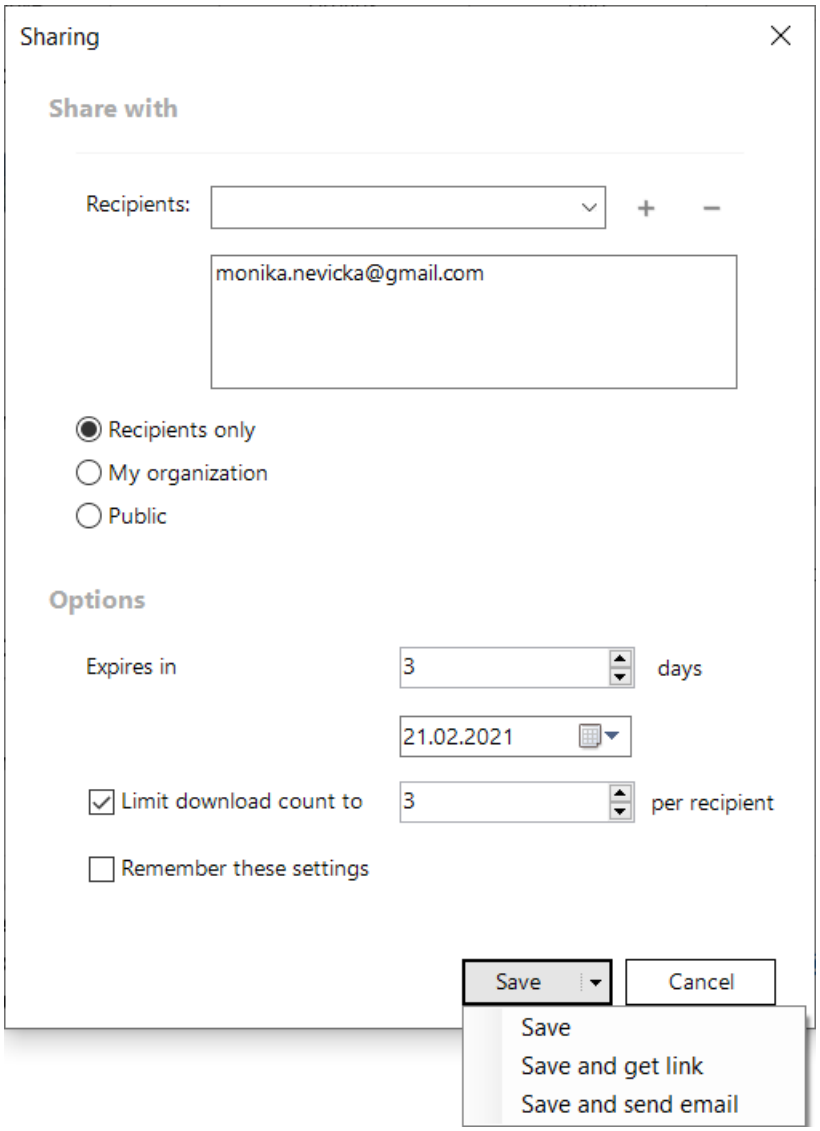
If an item has been shared before, it will be marked in its **Properties** (preview).



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.

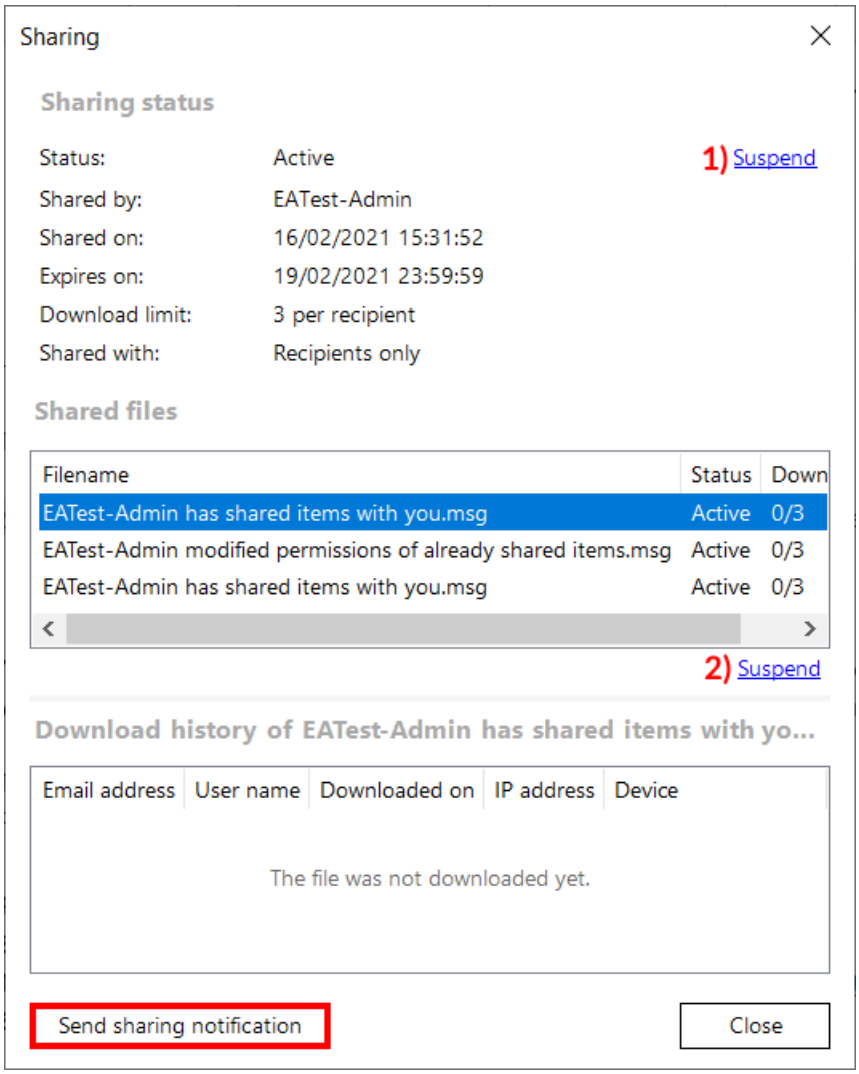


When you click on the **Modify** option, the **Sharing** pop-up window will open. Here, you will be able to add and/or remove recipients, change accessibility, the expiration date and download limit. The option **Save and get link** works the same as **Share and get link**, the option **Save and send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



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.



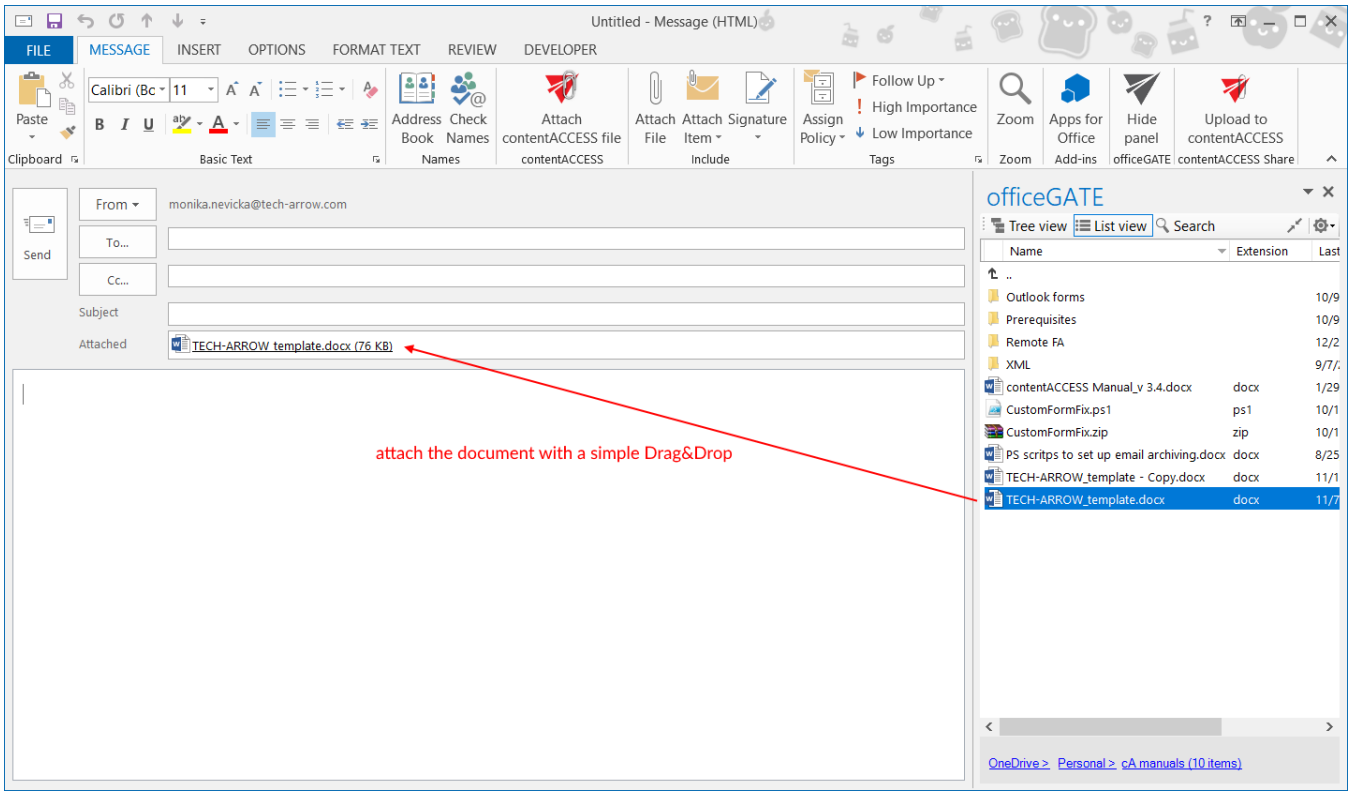
Drag&Drop actions

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

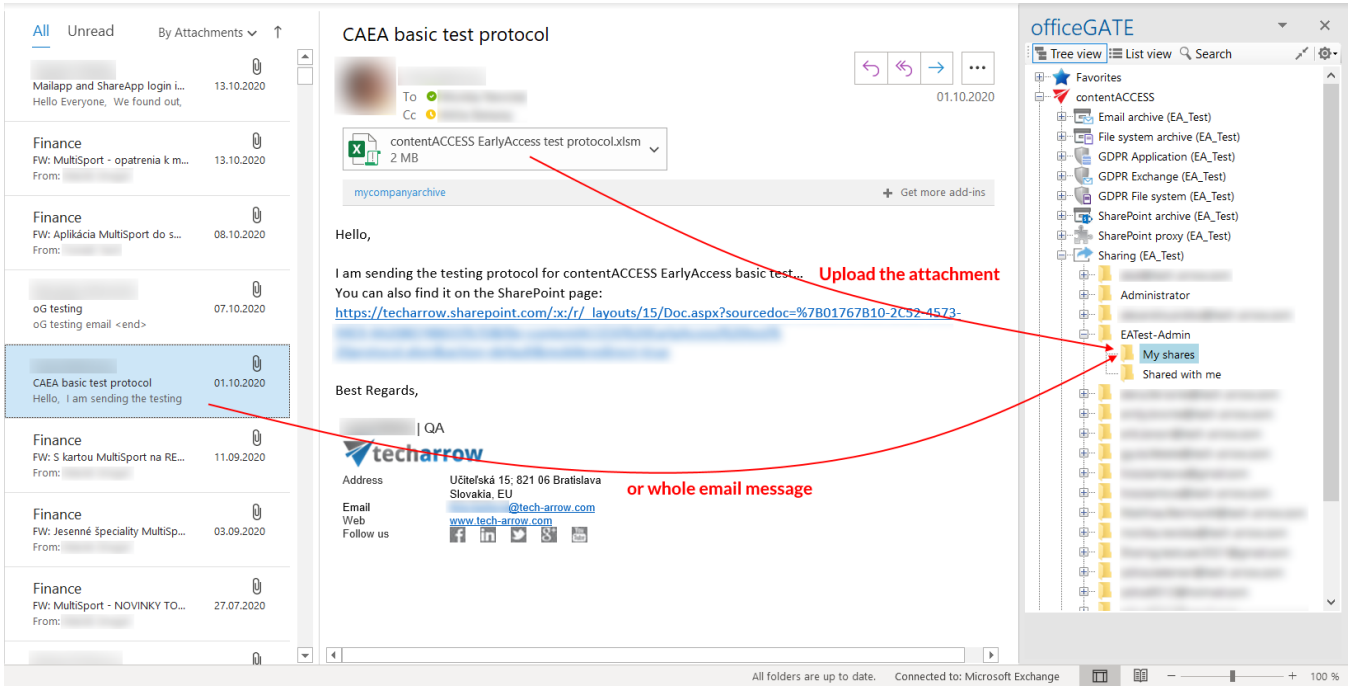
With clicking on the “New Email” button in MS Outlook open a compose window and start to write the message. In the compose window’s sidebar locate your file(s) that you want to attach, and drag it (them) into the email message. It is possible to drag&drop multiple files at one go. With the Drag&Drop action

you may attach the file as an attachment, or as a link. In the **General settings** (for more information refer to section General officeGATE settings) you can set how you would like to use this function.



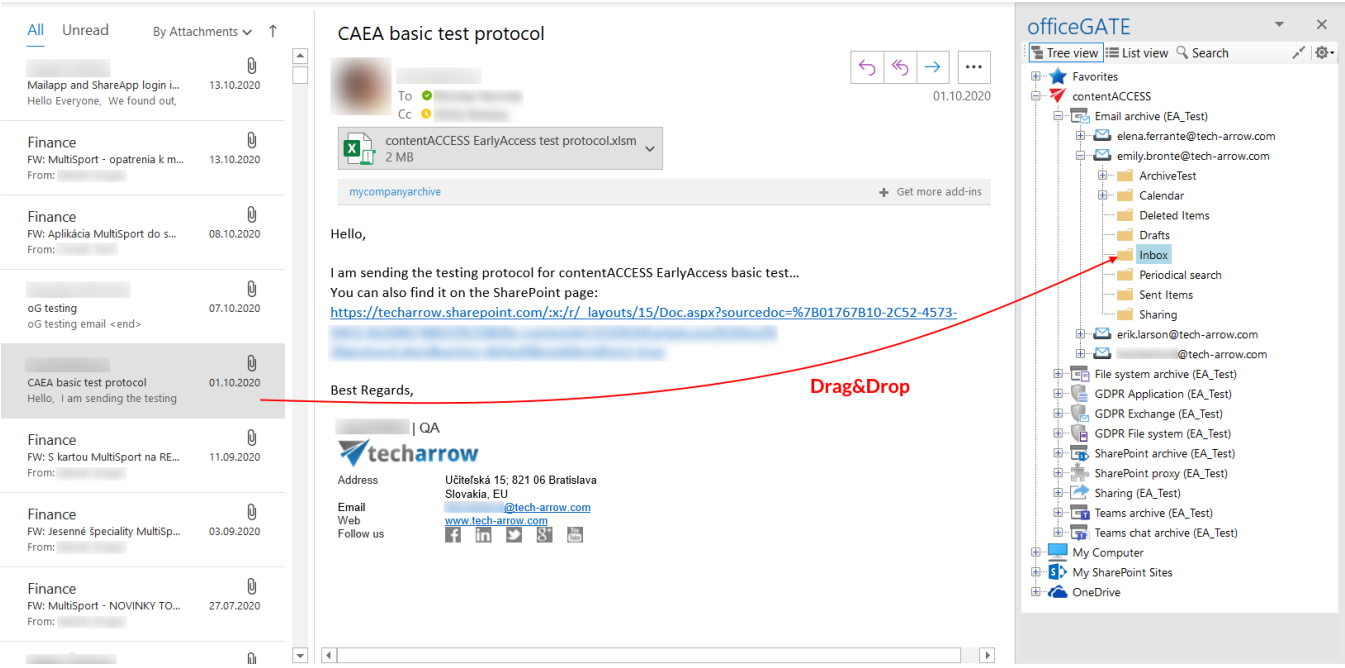
Uploading emails/attachments directly from the mailbox

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.

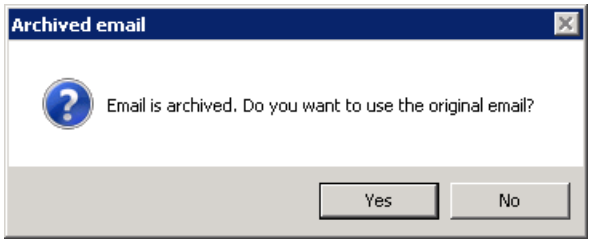


Manual email archiving using contentACCES

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.

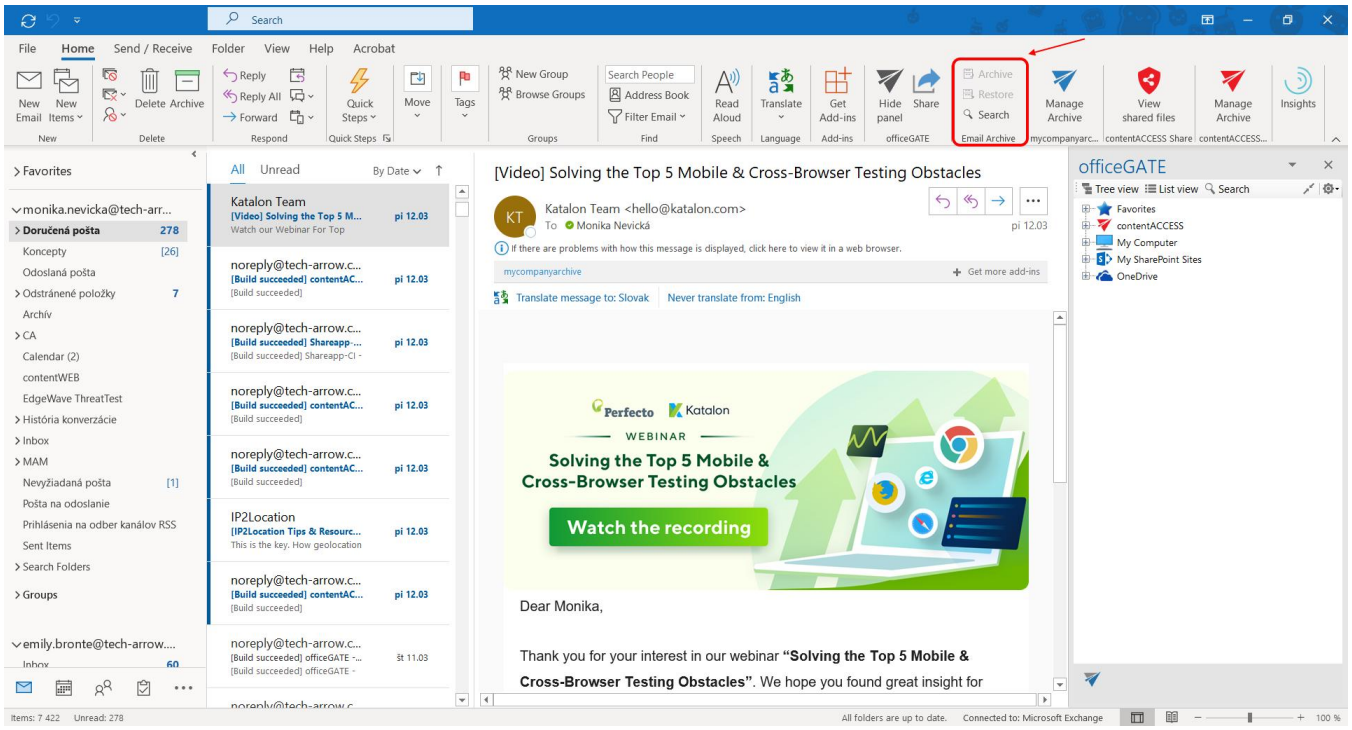


If the email has been already archived and the user drops this message to officeGATE, the application will warn him about that. The user will be asked, if he wants to archive the original email instead.



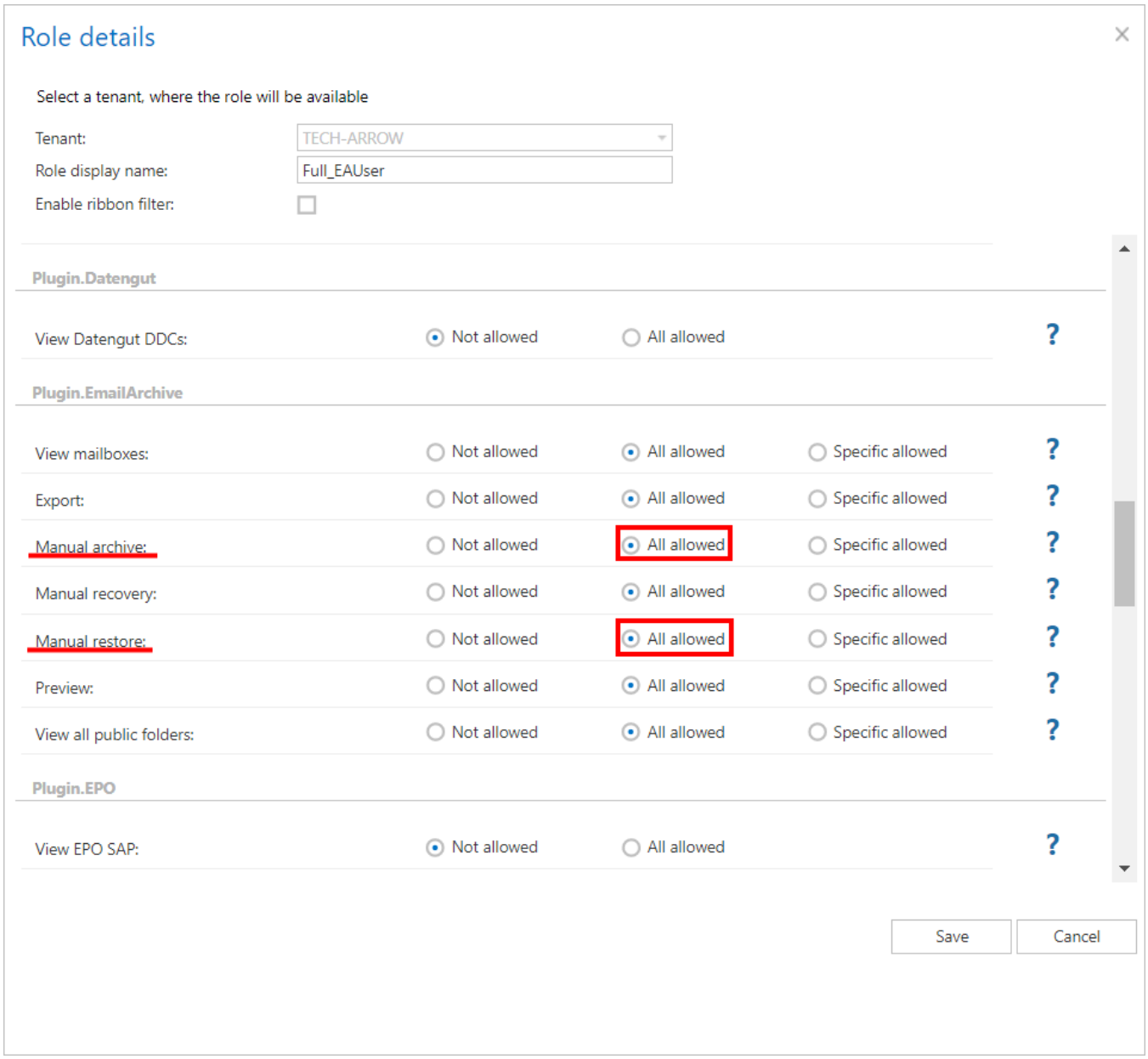
Handling emails – archive, restore, search

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

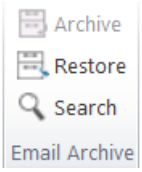


If you want to use this function, the following steps must be completed first:

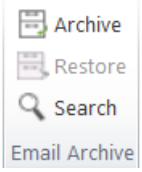
- officeGATE must be connected with contentACCESS
- Email archive must be configured for the selected mailbox
- Email archive job must be run at least once before for the mailbox
- The signed in user must have the following permissions allowed in his role in contentACCESS



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 Address book will be applied to the mail.



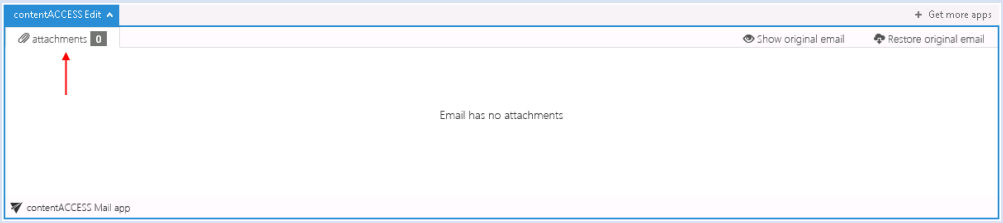
Screenshot A



Screenshot B

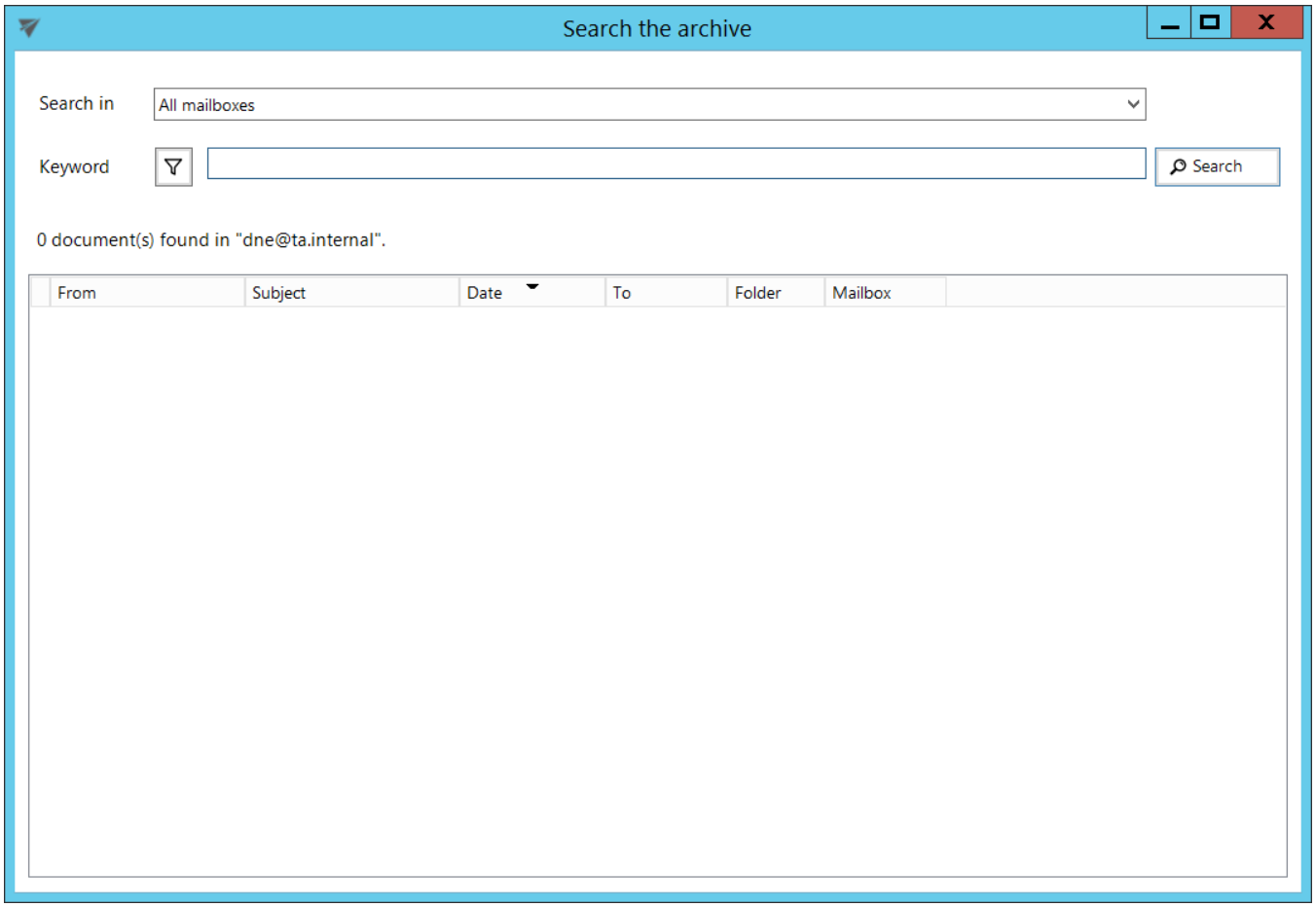
Note: For more information about email archiving and restoring, please check these sections : archive, restore.

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 (MailApp, officeGATE, contentACCESS Mobile) will show 0 attachments. However, if you open the original email, the attachments are shown.

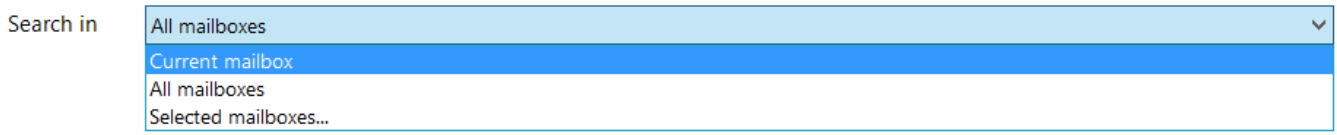


If this option **was checked**, but the email was containing embedded email (.msg attachment), this embedded email won't be displayed between the attachments in our apps.

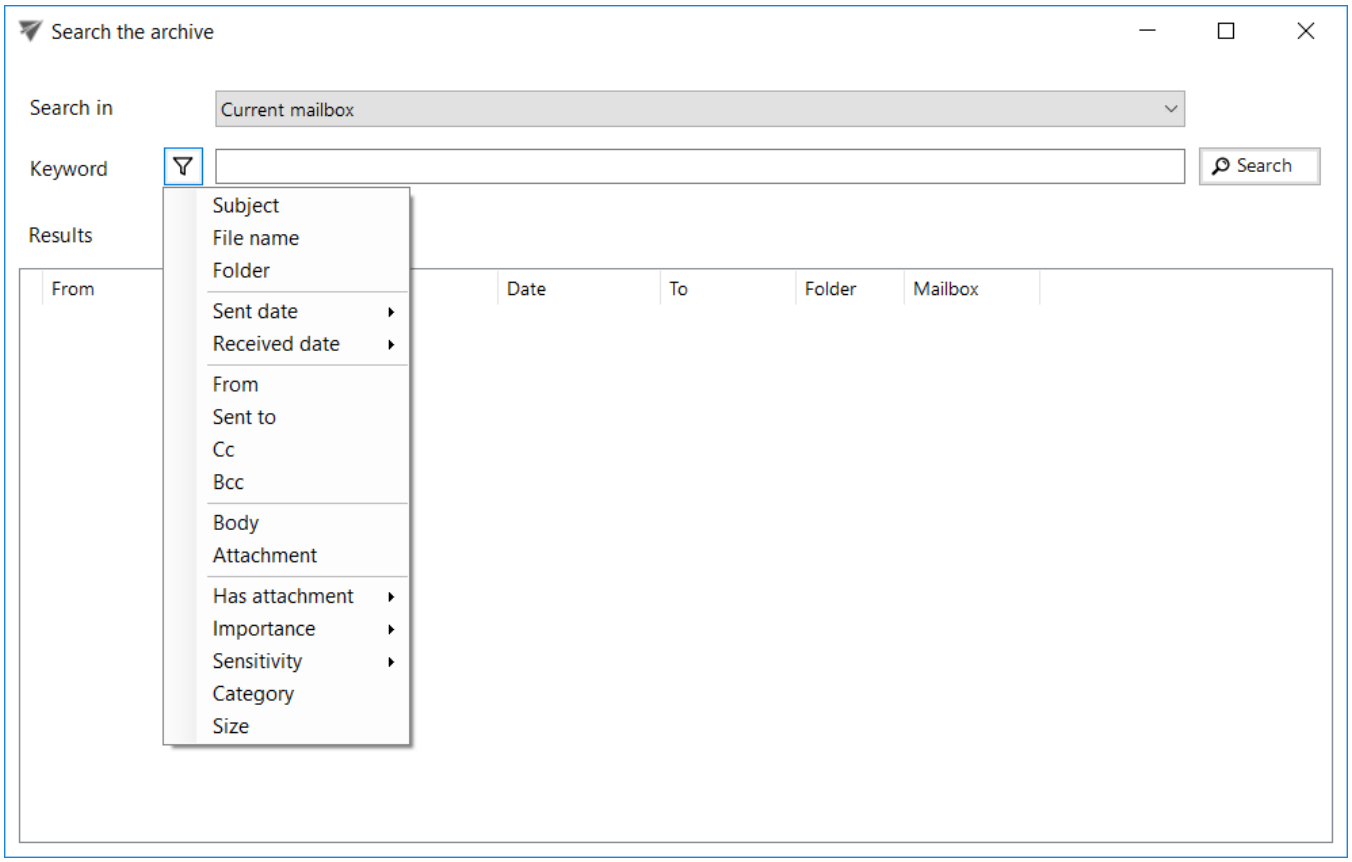
If you want to search for emails, they must be archived and processed by the indexing job before. After clicking on the **Search** option, a pop-up window opens.



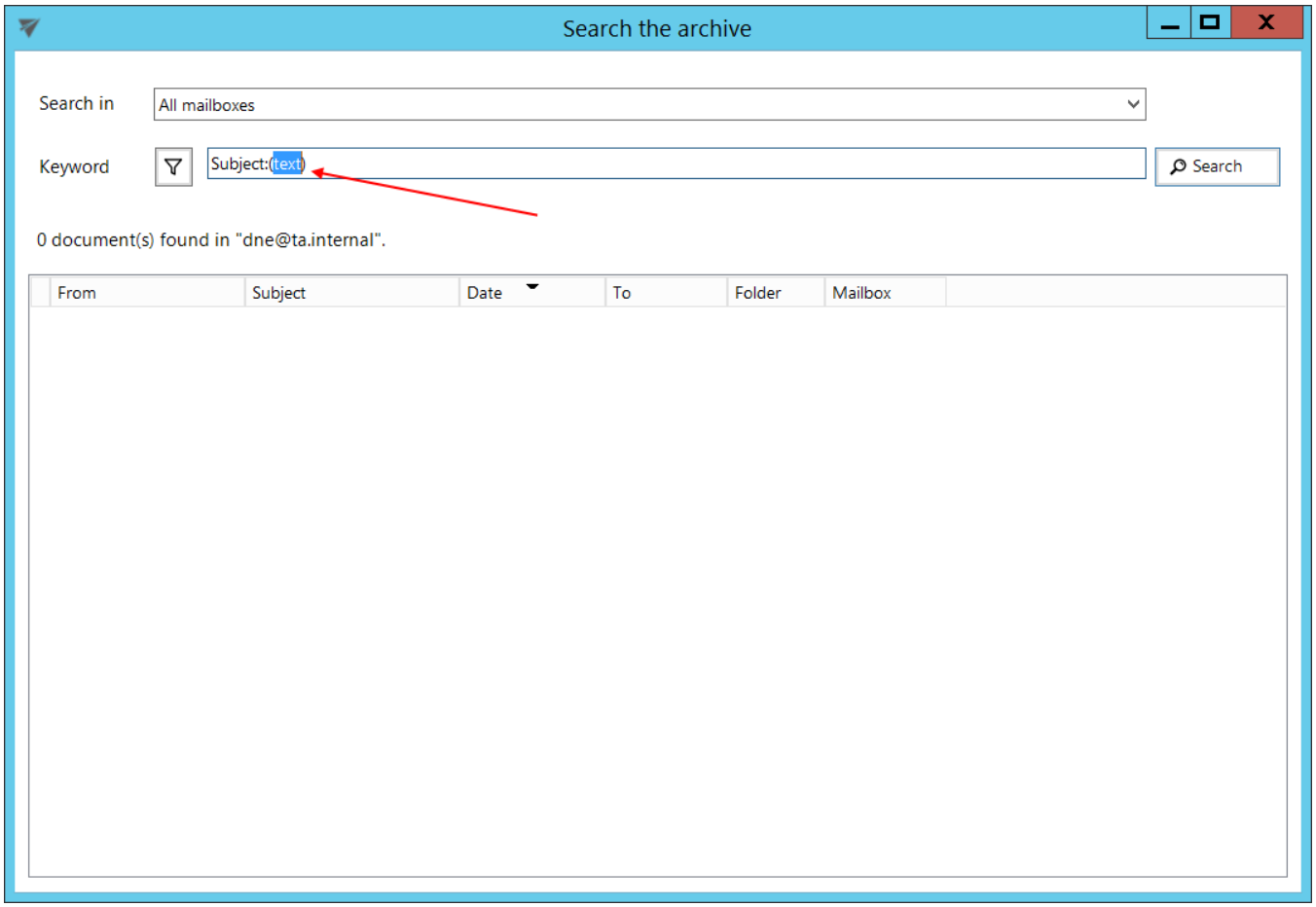
In the **Search in** dropdown list, it is possible to select from the following options:



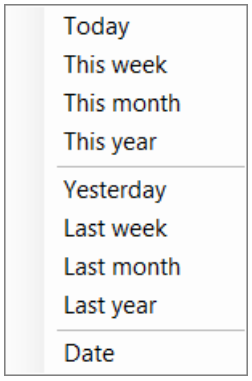
To specify the properties to be searched for, click on the Search refinement icon.



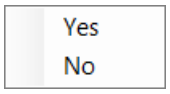
After clicking on an option, it will be added to the **Keyword** list and you can define it.



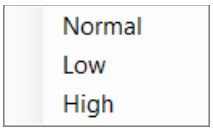
Sent date, **Received date**, **Has attachment**, **Importance** and **Sensitivity** do not need to be specified manually, you can choose one from the predefined options.



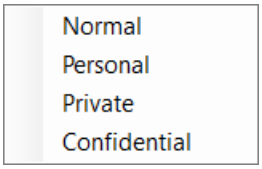
Screenshot : Sent date/Received date options



Screenshot : Has attachment options

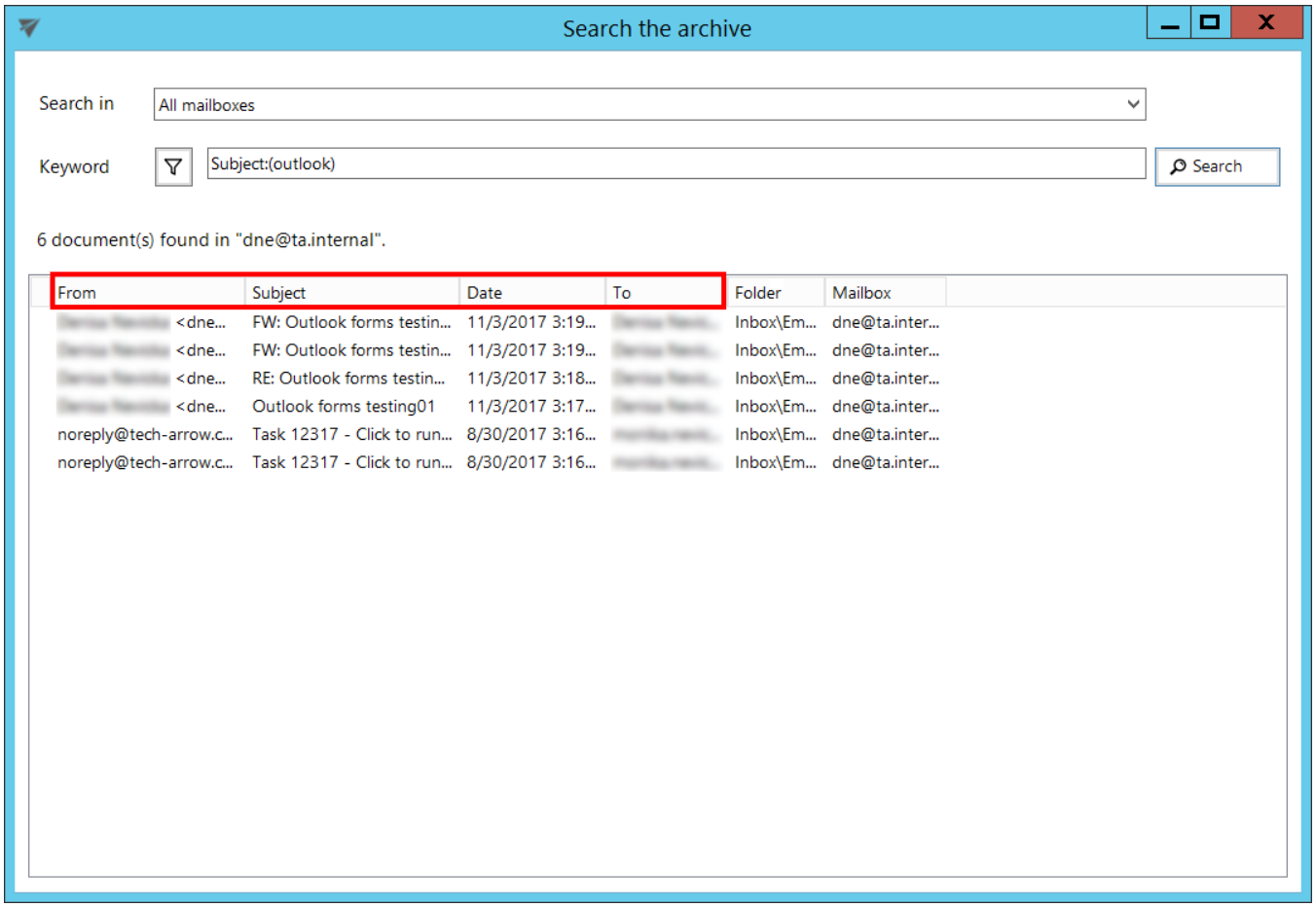


Screenshot : Importance options

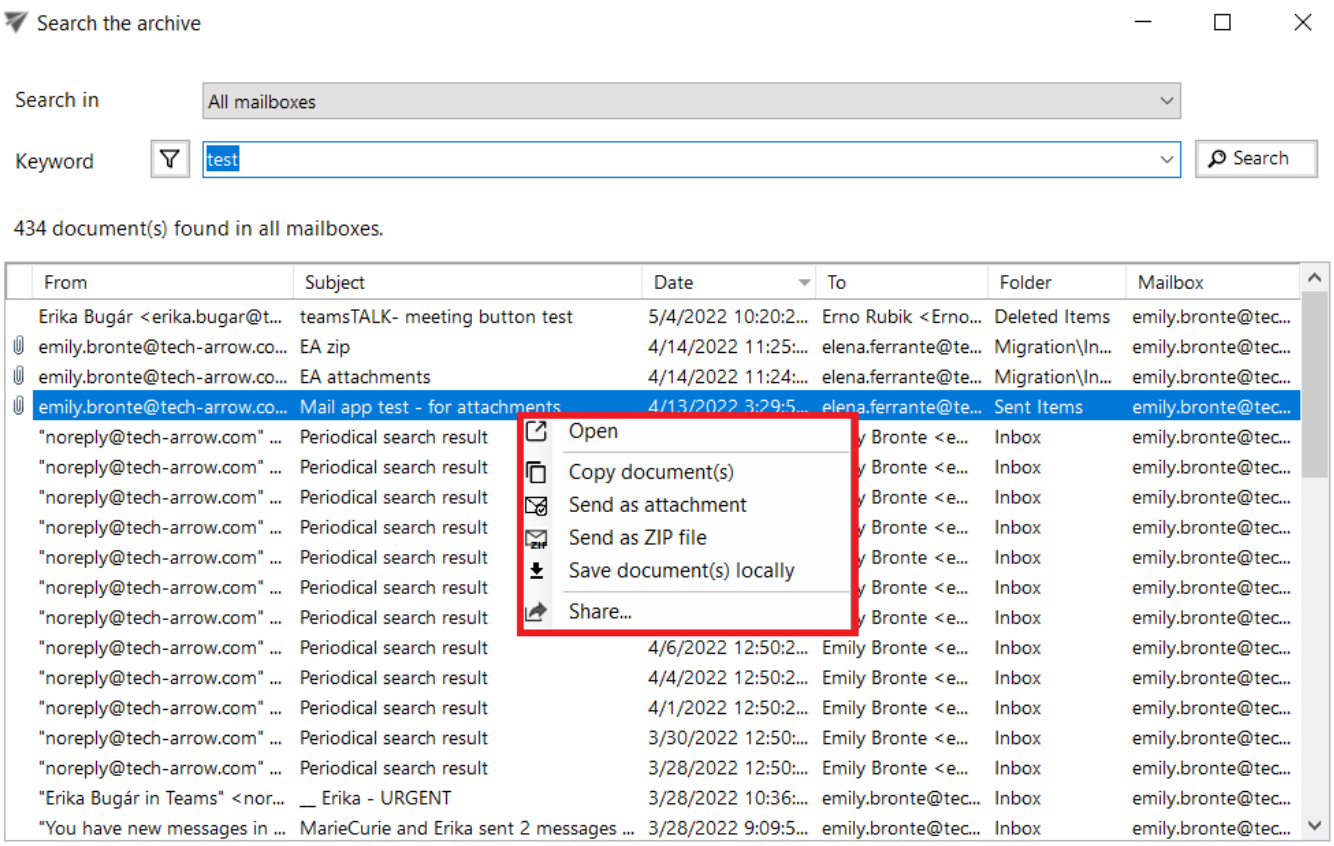


Screenshot: Sensitivity options

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



It is possible to process the search results further using the context menu.



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.

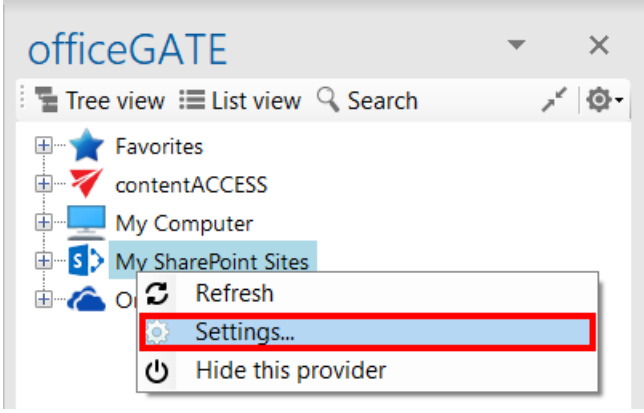
officeGATE enables for the user to use SharePoint's content type selection and metadata fill directly from Outlook by uploading a document. This feature allows to categorize your documents better and helps to save important information about a file or list item for future use. Different content types 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:

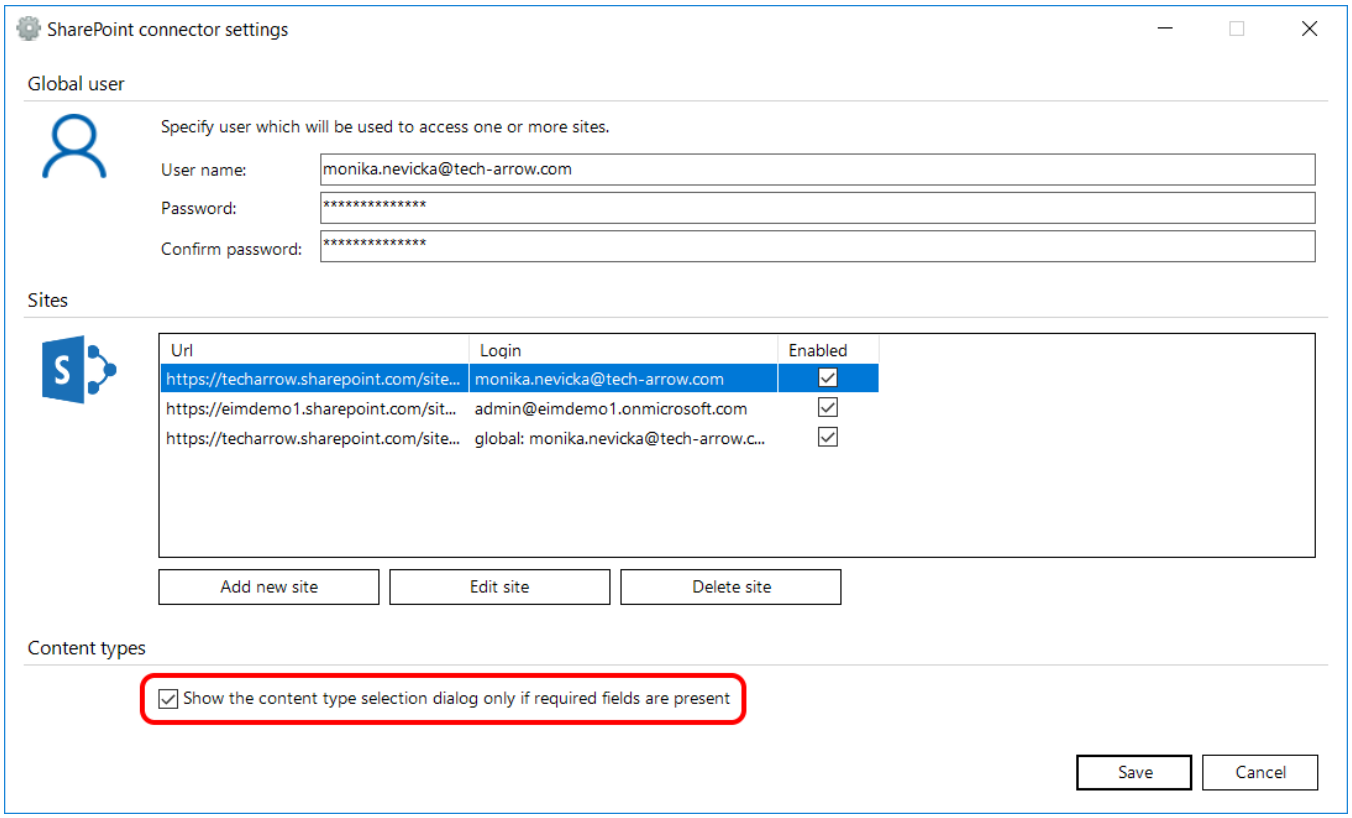
1) the metadata (fields) that are set on SharePoint are **required**, or

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:

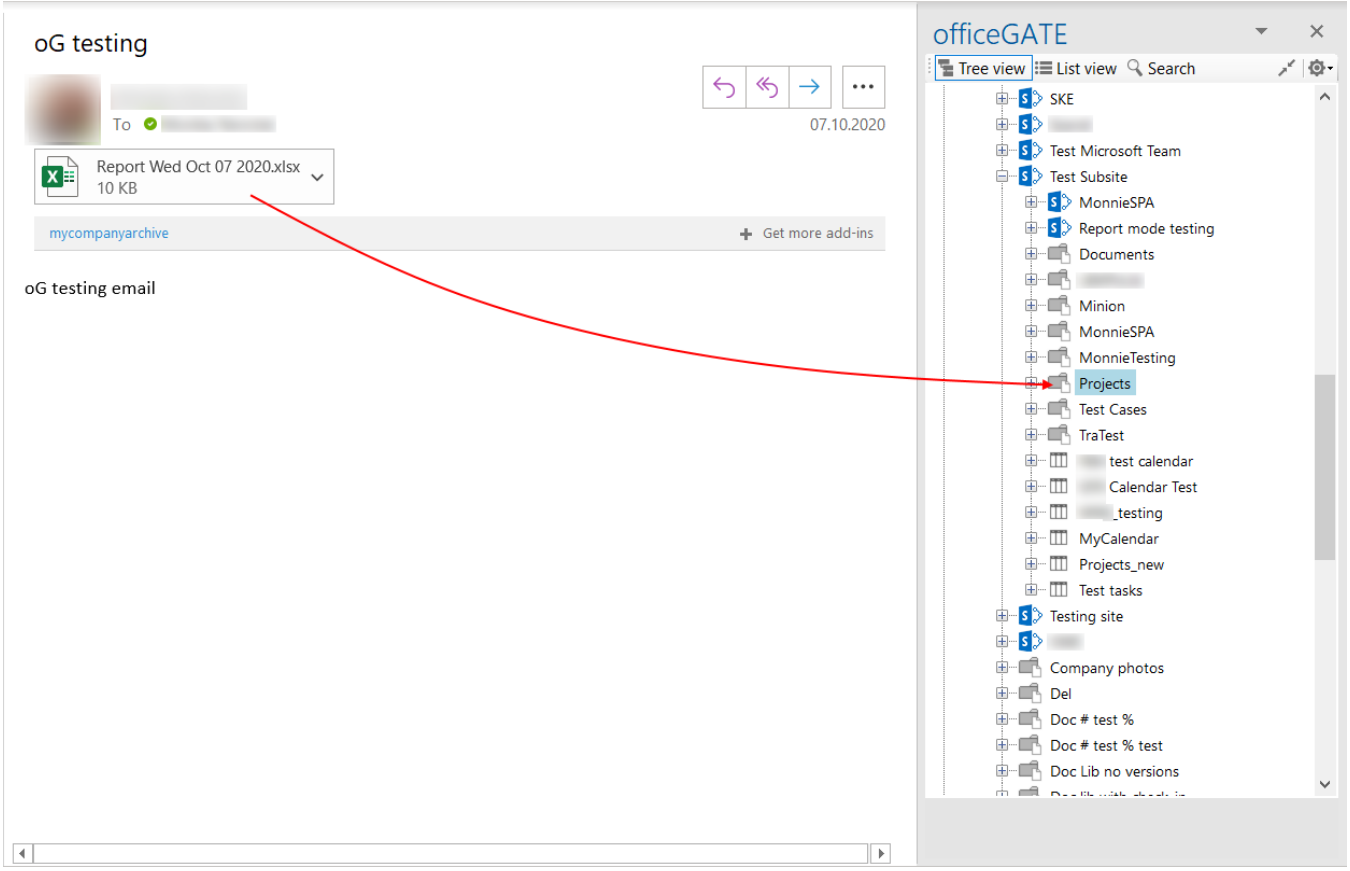


Check/uncheck the **Show the content type selection dialog only if required fields are present** checkbox depending on how you would like to use this feature. On the screenshot above we have configured, that we would like to specify these data only if there are required fields present.

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.


oG testing
To
07.10.2020
Report Wed Oct 07 2020.xlsx
10 KB
mycompanyarchive
Get more add-ins
oG testing email
officeGATE
Tree view
List view
Search
SKE
Test Microsoft Team
Test Subsite
MonnieSPA
Report mode testing
Documents
Minion
MonnieSPA
MonnieTesting
Projects
Test Cases
TraTest
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MyCalendar
Projects_new
Test tasks
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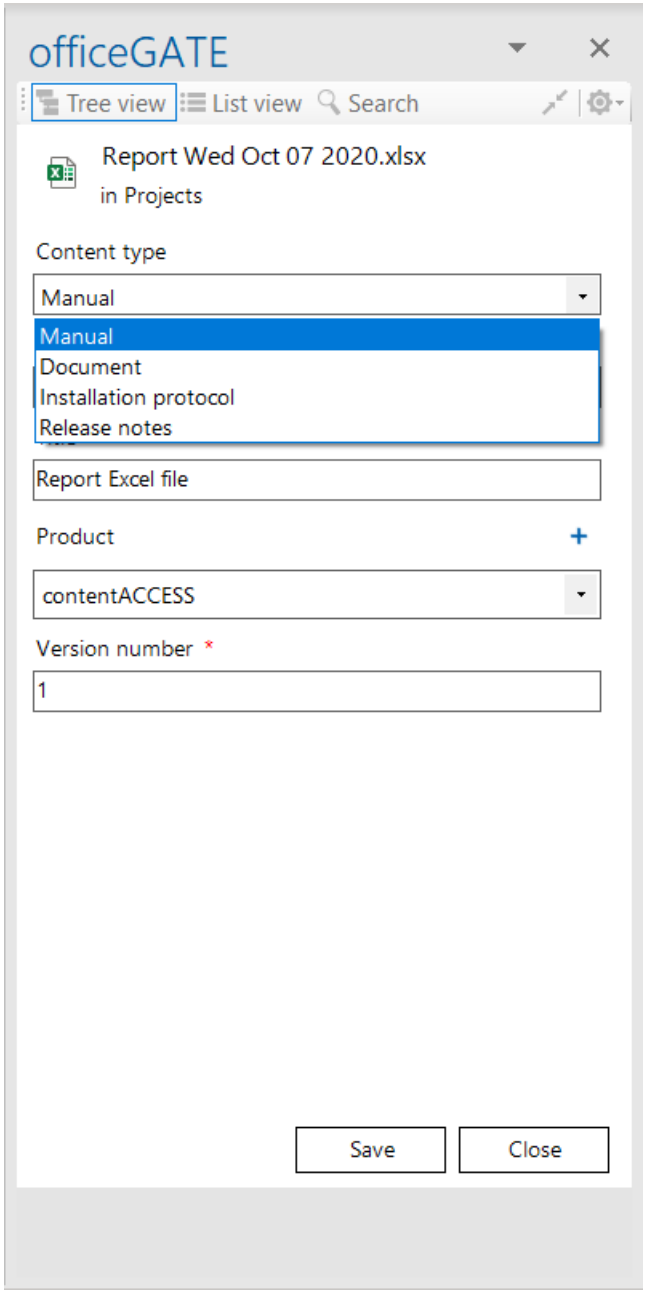
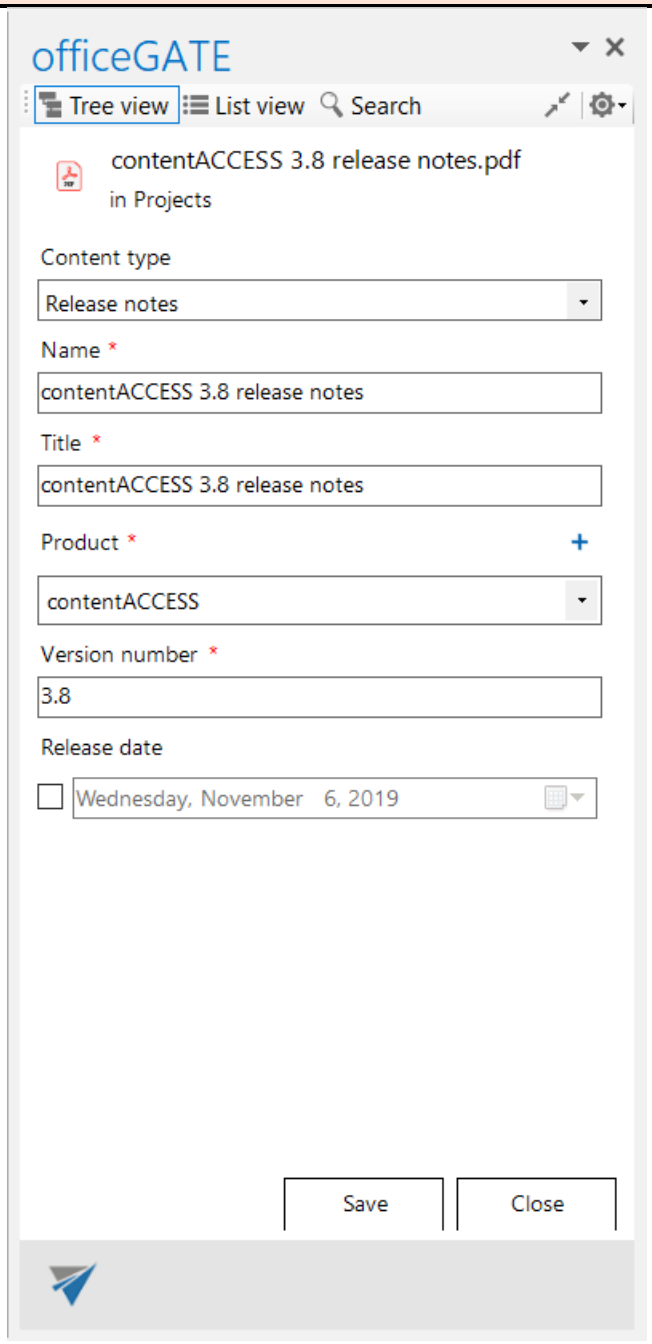


On the illustrative screenshot above there are 4 content types available for the user: **Manual, Document, Installation protocol** and **Release notes**. The user may select one of these content types. In our case, we chose **Manual** content type from the list. Required metadata fields are dependent 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.



<u>Since version 3.3, officeGATE is able to handle the following in My SharePoint Sites:</u>

- 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

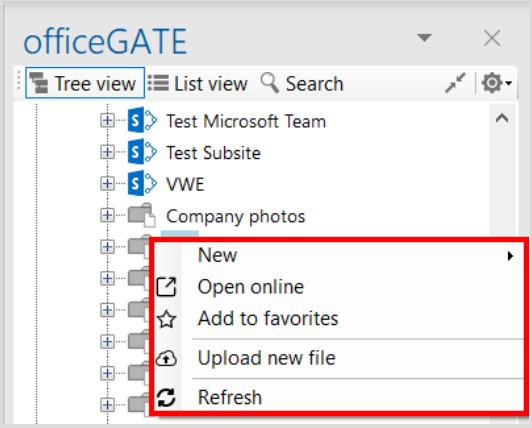
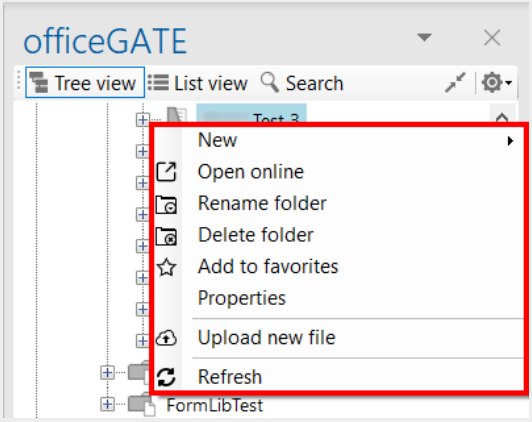
List

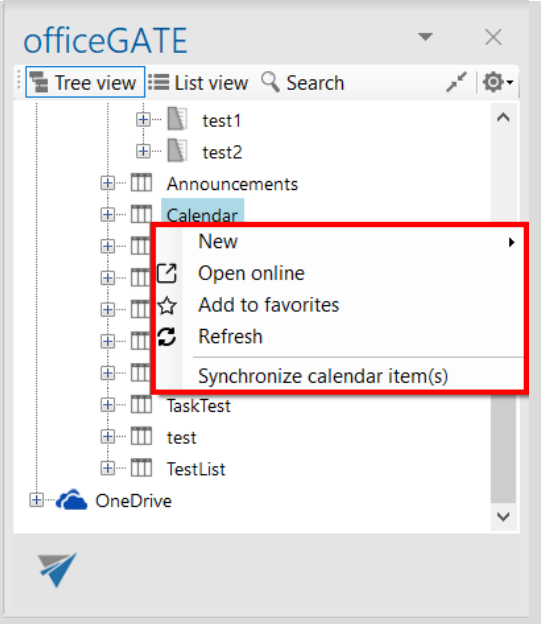
- contains only documents consisting of metadata, attachments can be added to these documents

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 on-premise SharePoint, you will have the options **"New item"** and **"New folder"** instead, like in officeGATE version 3.9).

SharePoint item	Context menu options	Screenshot

Document library	✓ New (with submenu items based on the selected site/document set/folder/list templates ✓ Open online ✓ Add to favorites ✓ Upload new file ✓ Refresh ✓ Enable offline access ✓ Enable offline access (recursive)	
Document set	✓ New (with submenu items based on the selected site/document set/folder/list templates ✓ Open online ✓ Rename folder ✓ Delete folder ✓ Add to favorites ✓ Properties ✓ Upload new file ✓ Refresh ✓ Enable offline access ✓ Enable offline access (recursive)	

List	✓ New (with submenu items based on the selected site/document set/folder/list templates ✓ Open online ✓ Add to favorites ✓ Refresh ✓ Synchronize calendar items (if the list contains any)	

Creating new SharePoint item

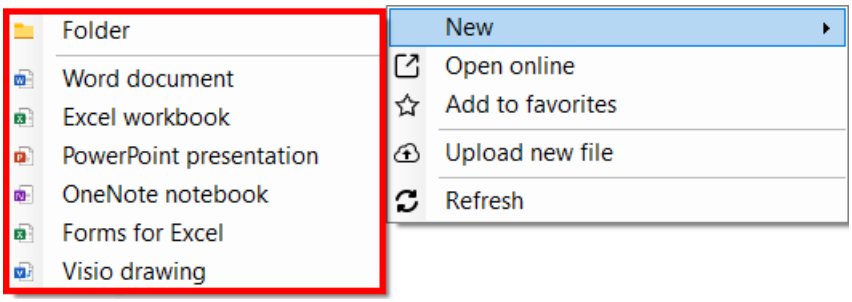
Depending on list type the user clicked on, one of the following items will be displayed in context menu:

Upload new file

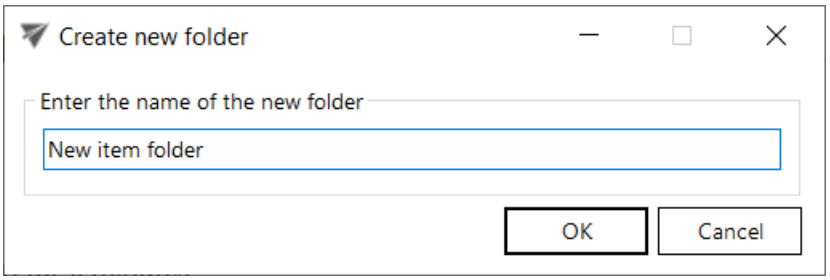
The file selection dialog will open, followed by document metadata dialog (if they are required).

New

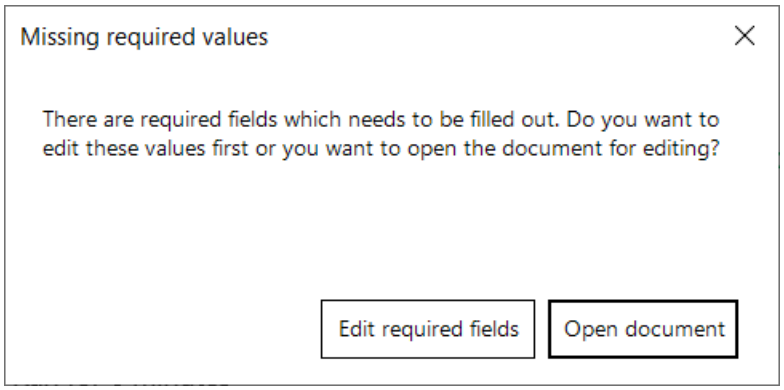
A submenu with the list of all available templates for the selected entity will open.



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

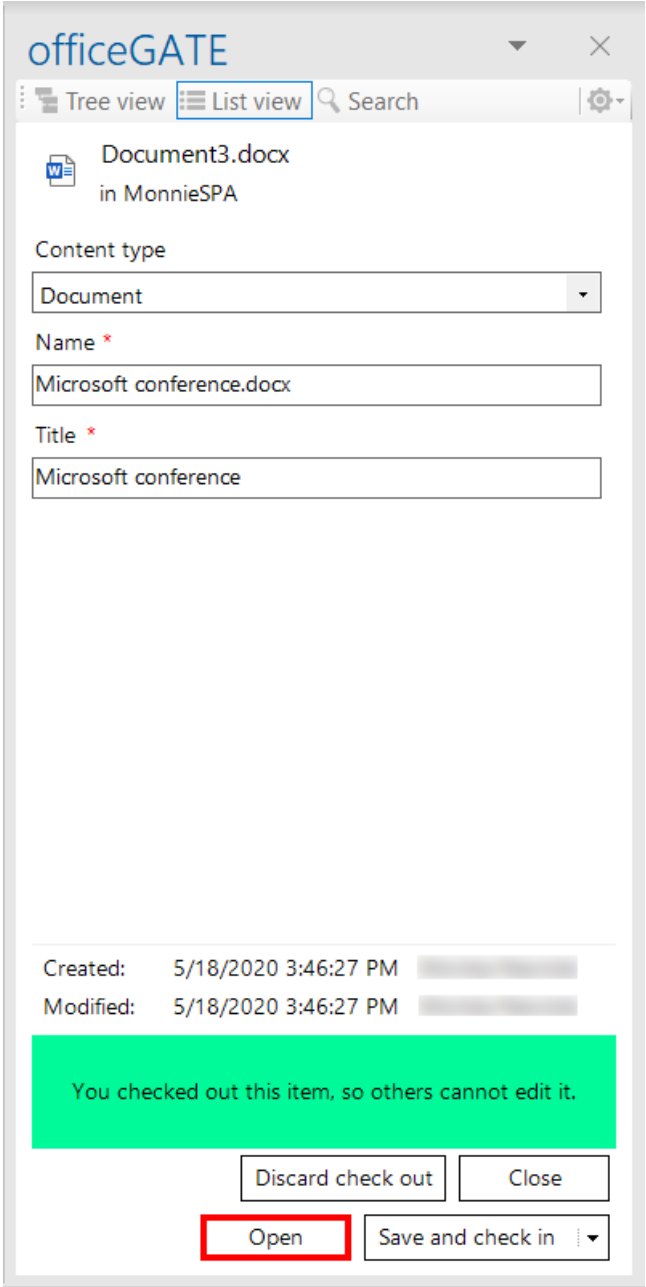


If you chose one of the available templates (Word document, Excel workbook, etc.) and some required values (metadata) are missing, you will get this warning:



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.

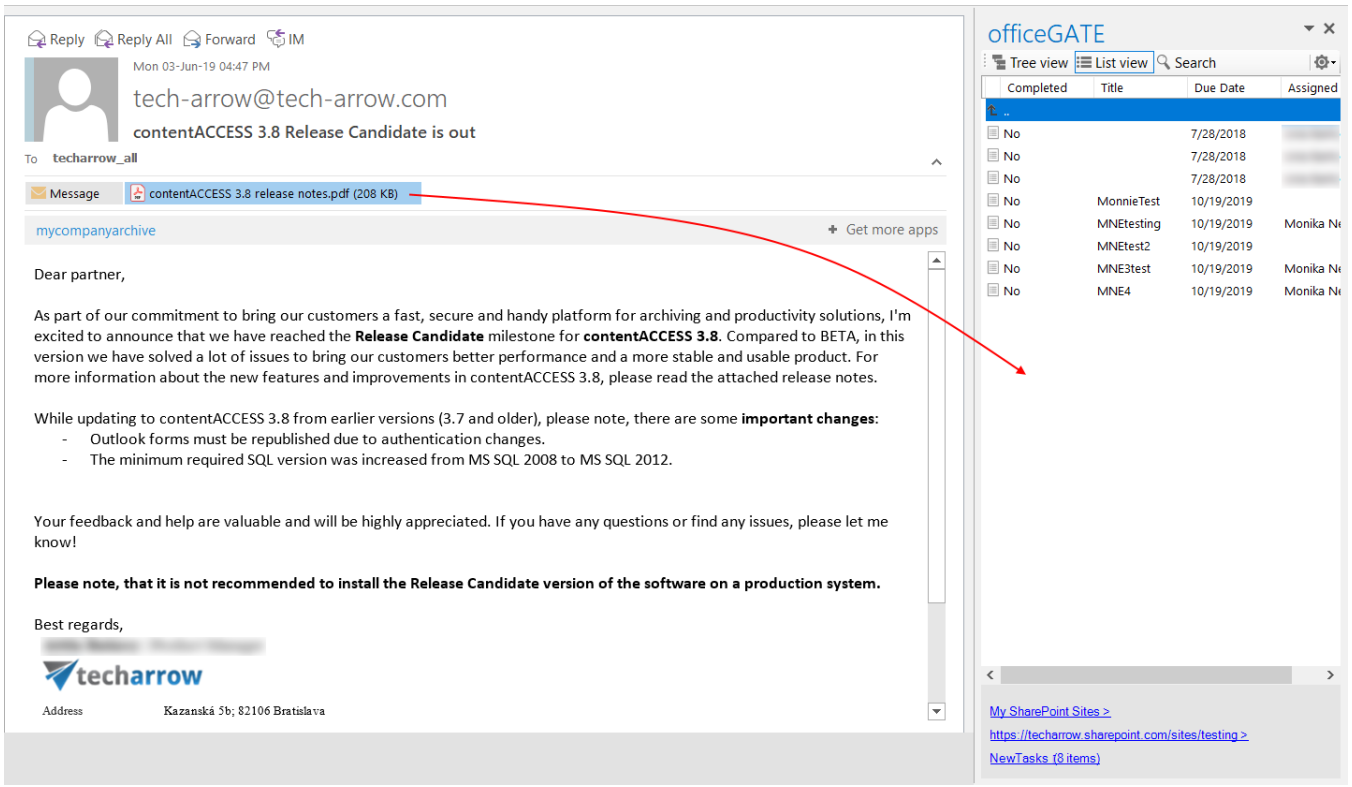


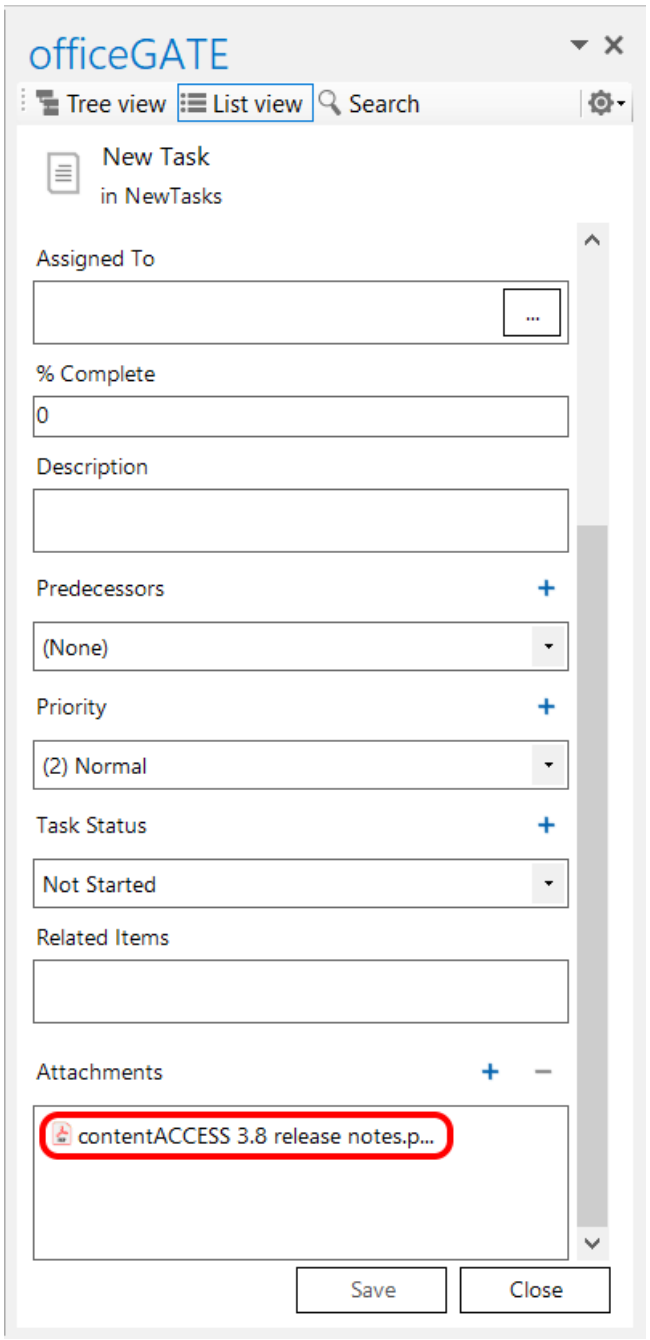
The document is then created in SharePoint.

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

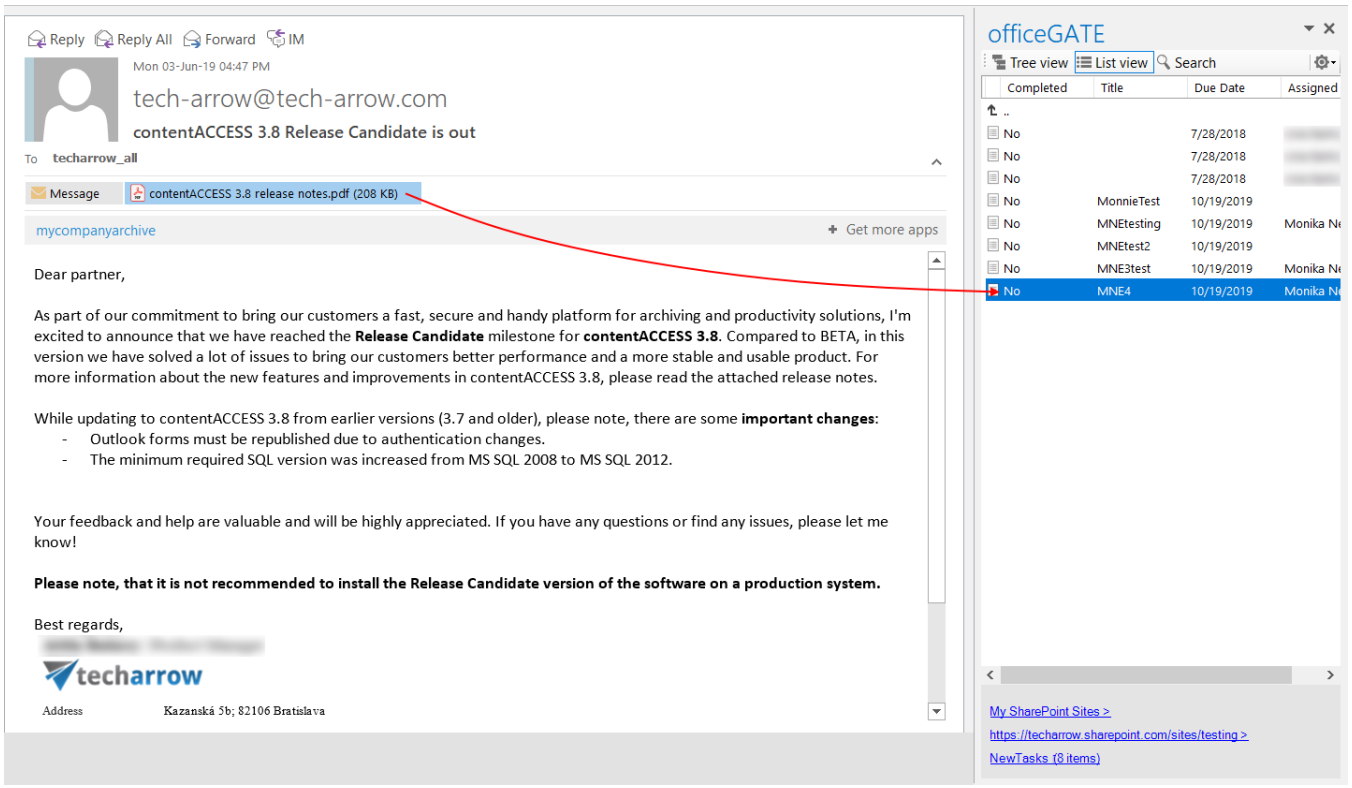
Another way of item creation is by Drag&Drop. If the user drops an Outlook item or a file into a list that supports attachments, one of these two behaviors will occur:

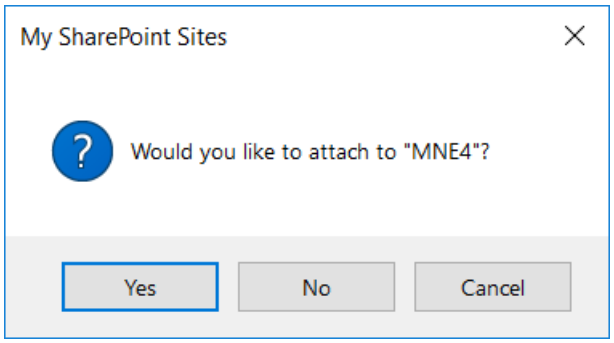
1. If the user drops the item to empty space of the list, the item creation dialog will open, with the item being pre-filled in the attachment list.





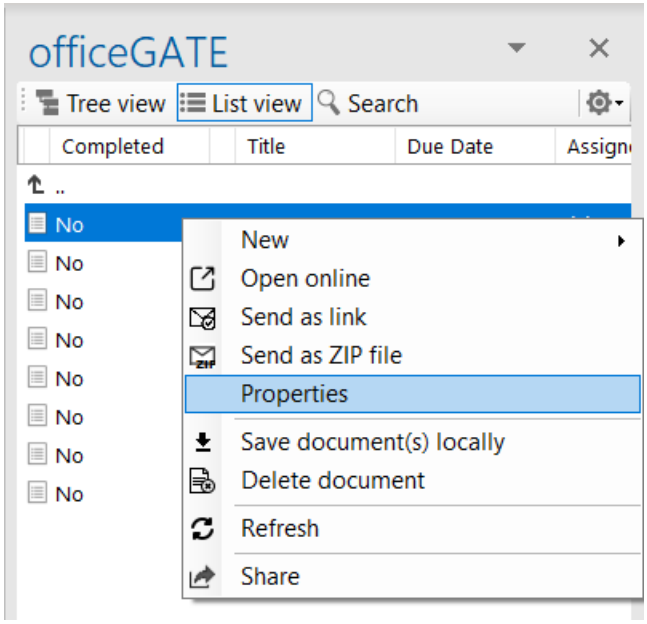
2. If the user drops the item to an existing item, a question whether he wants to create a new item using the dropped item or to attach the item to the existing item (drop target) will appear.





Opening and updating an item

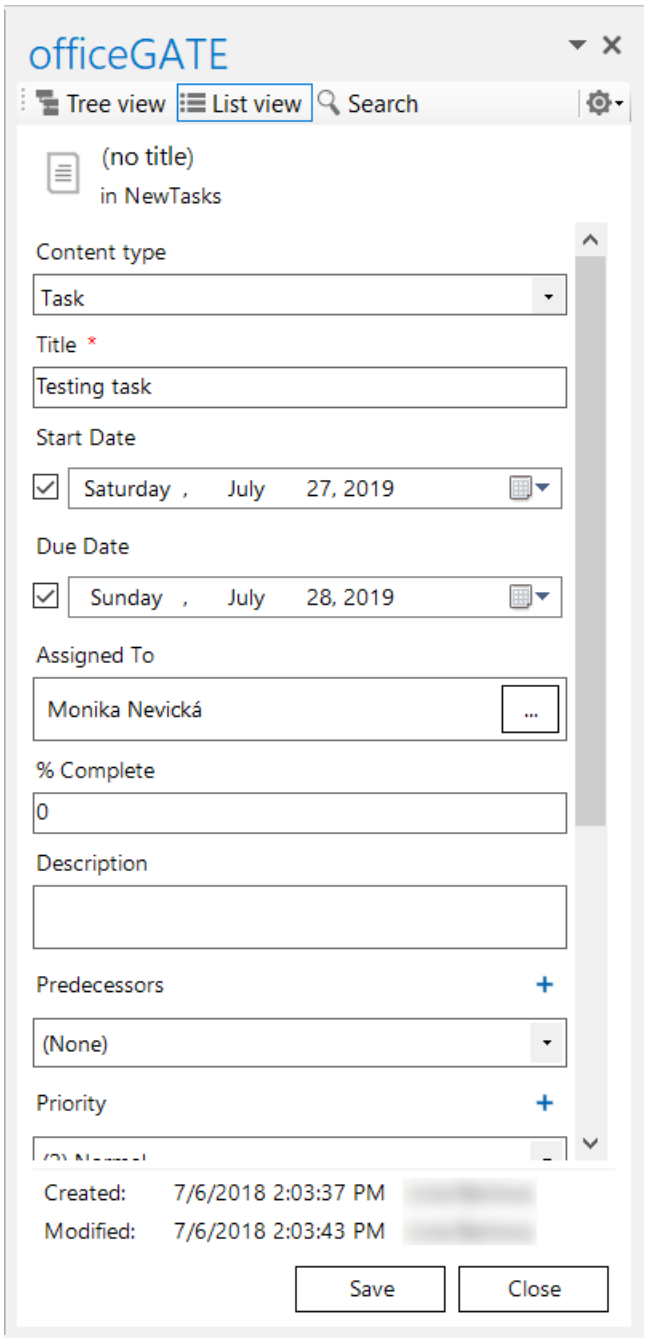
The main content of a **document library item** is the file – double-clicking on it will download and open it in the suitable application. If the user wants to view and/or modify its properties, it is possible by selecting **Properties** from the item's context menu: it will open the item properties 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.

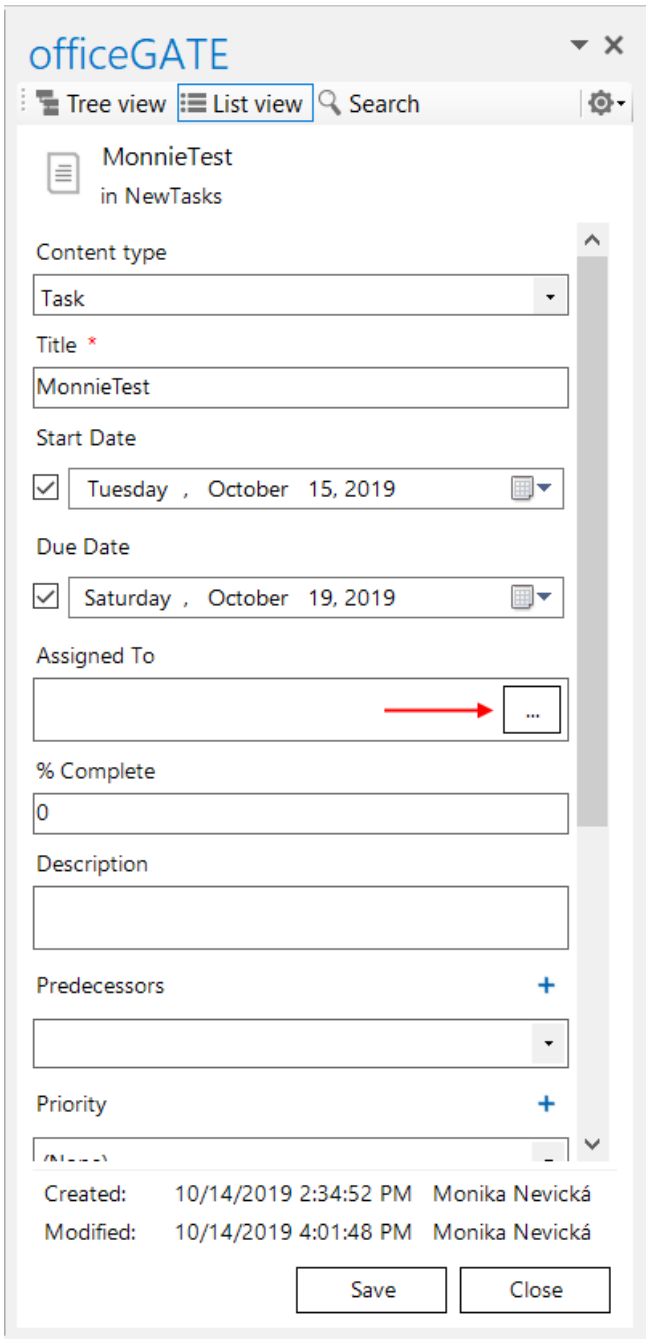
Viewing and editing metadata

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.

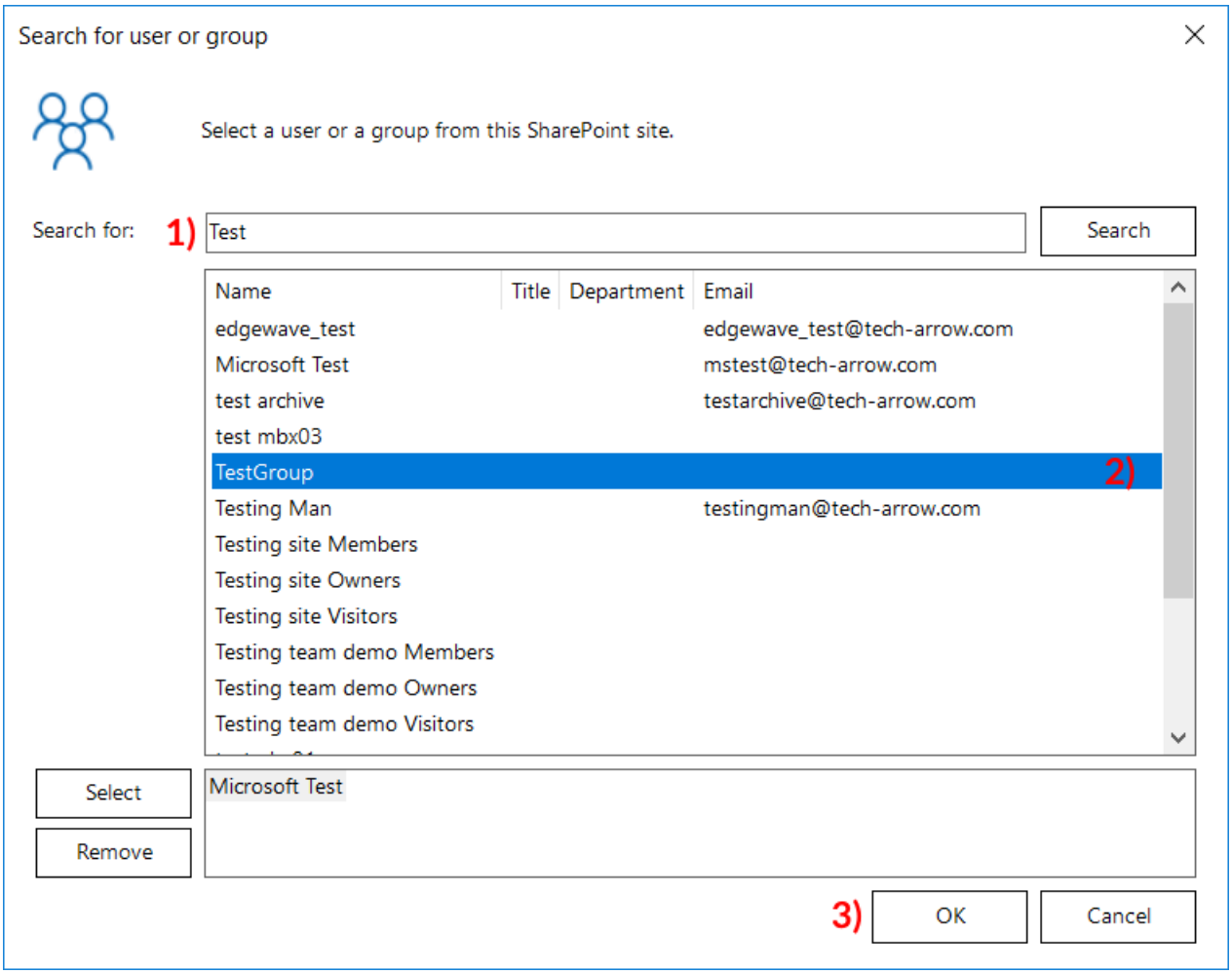


Picking a user or a group from a SharePoint site

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:



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).



Offline synchronization

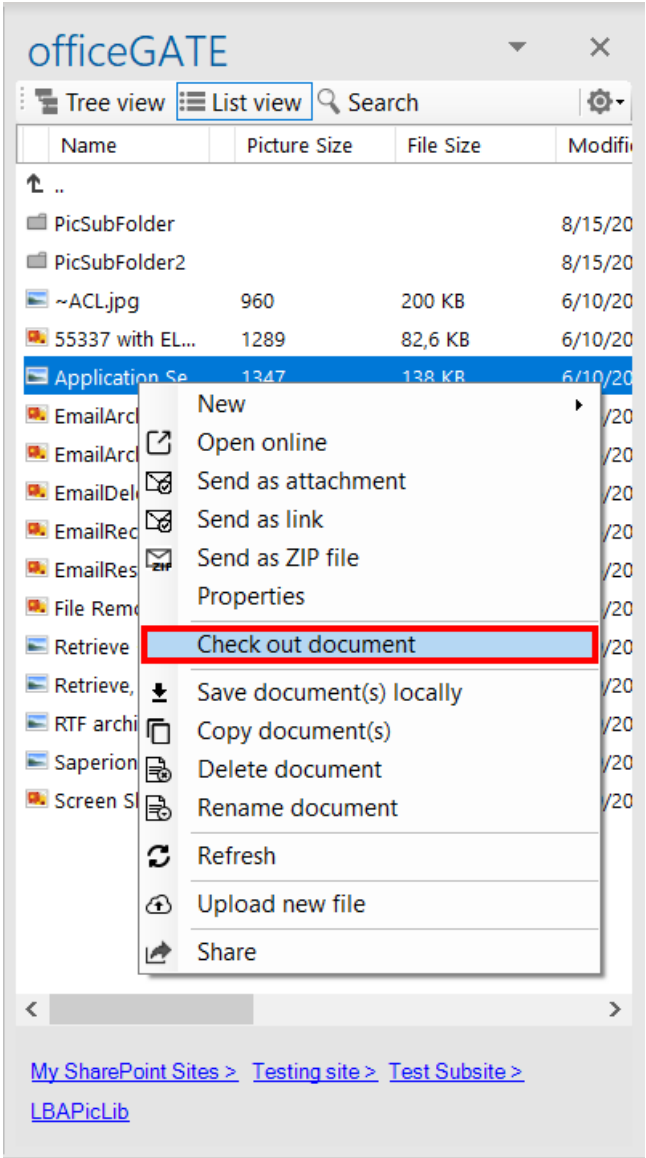
Note: Offline synchronization is currently disabled for the SharePoint provider.

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.

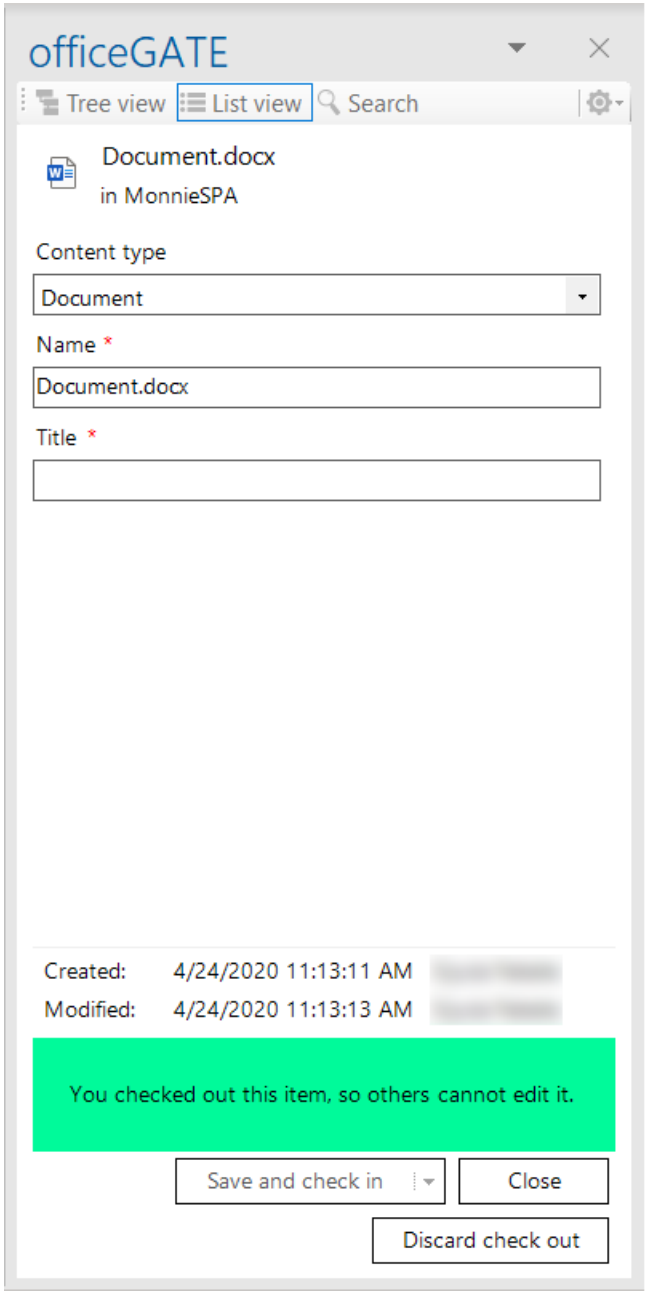
To check out a document, select the **Check out document** option from its context menu.

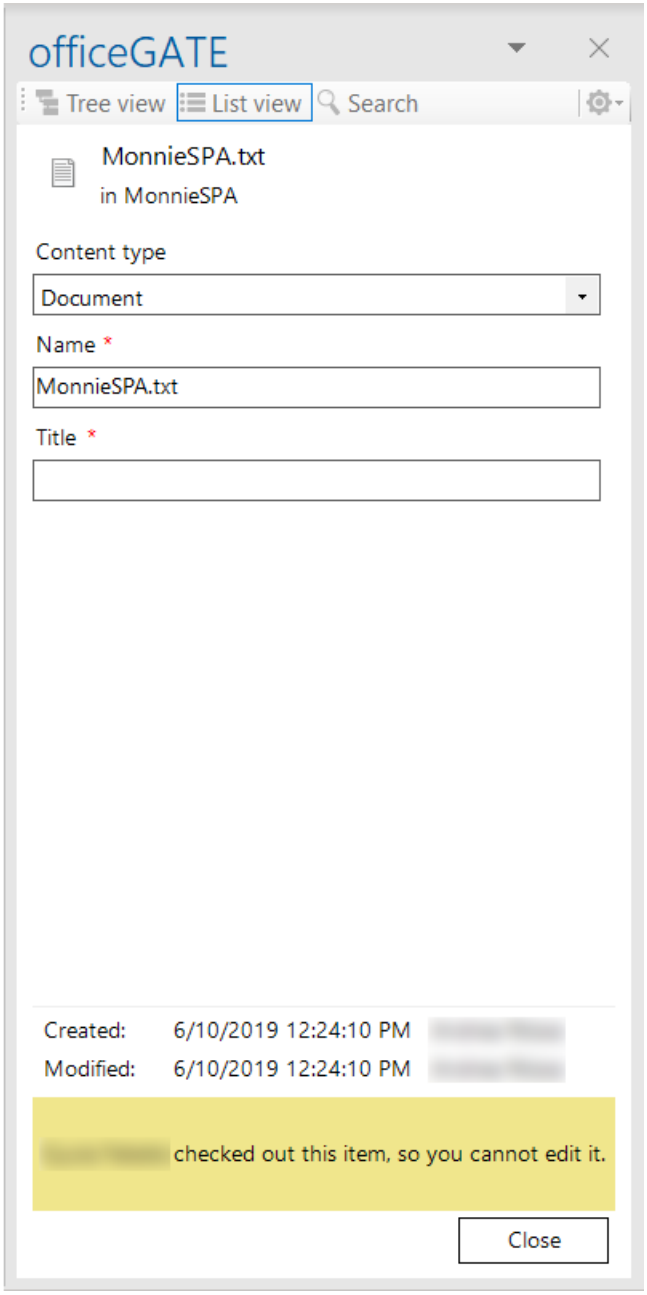


When a document is **checked out**, it is marked the following way:

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

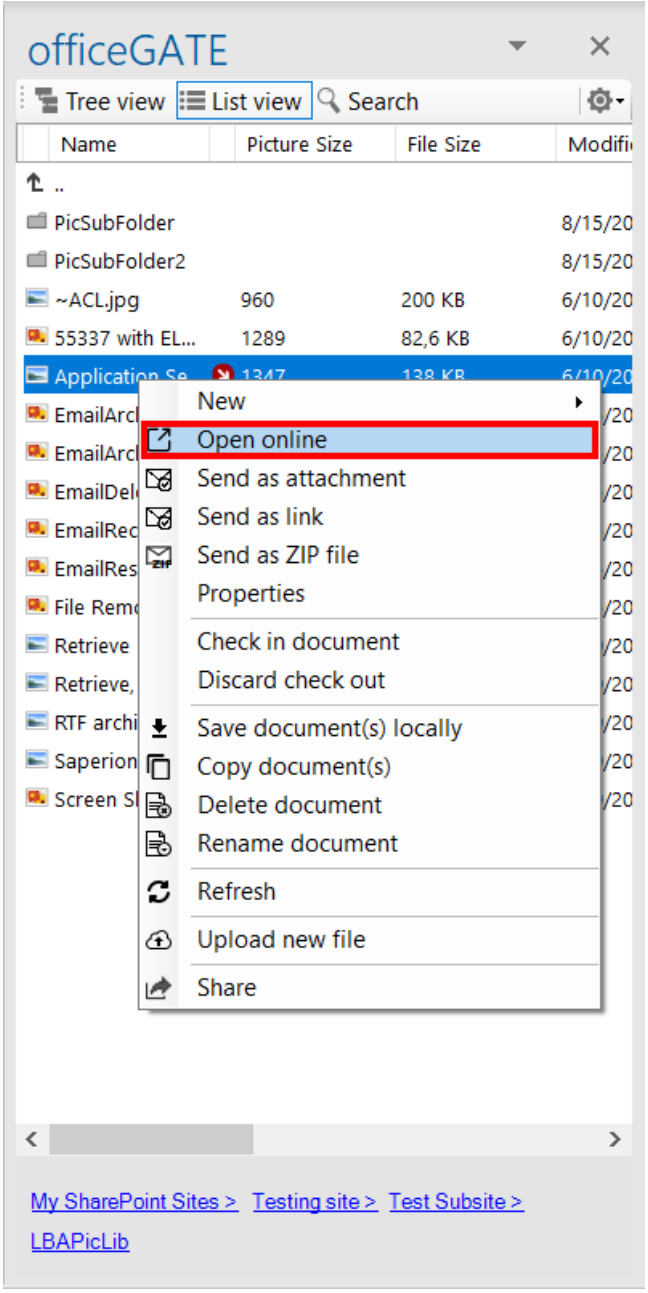
Details about the **check out** can be viewed by selecting **Properties** from the item's context menu.



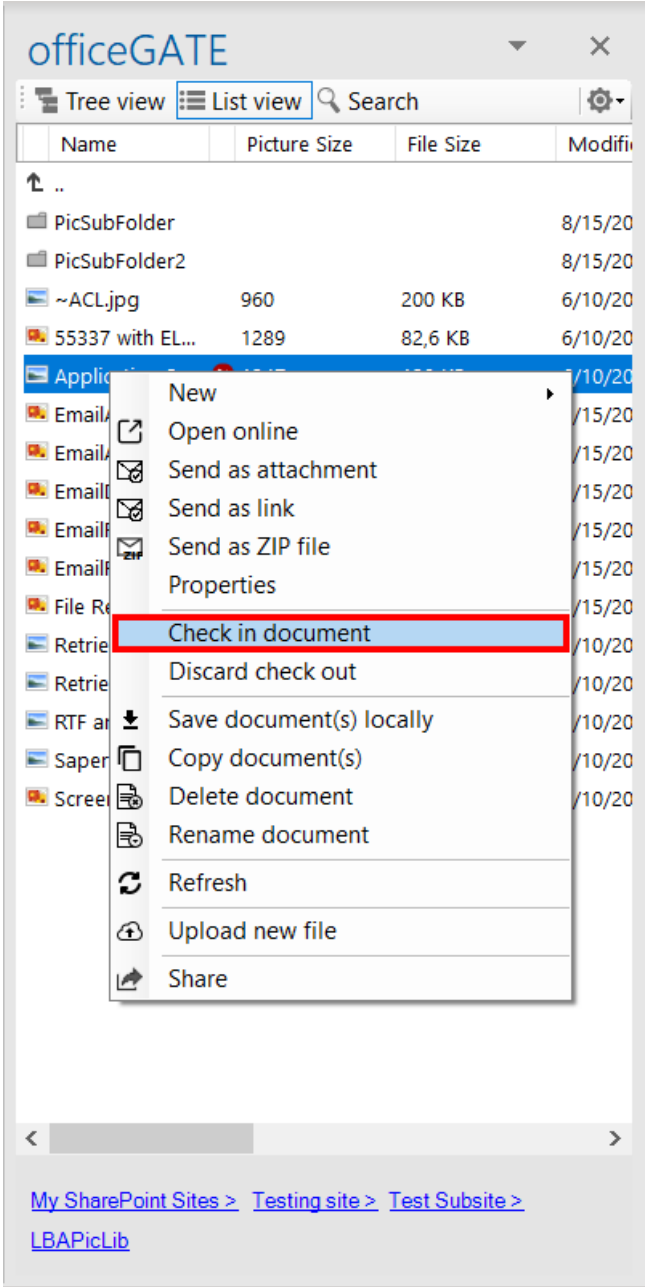


Screenshot: Item checked out by the current user (left) and item checked out by different user (right)

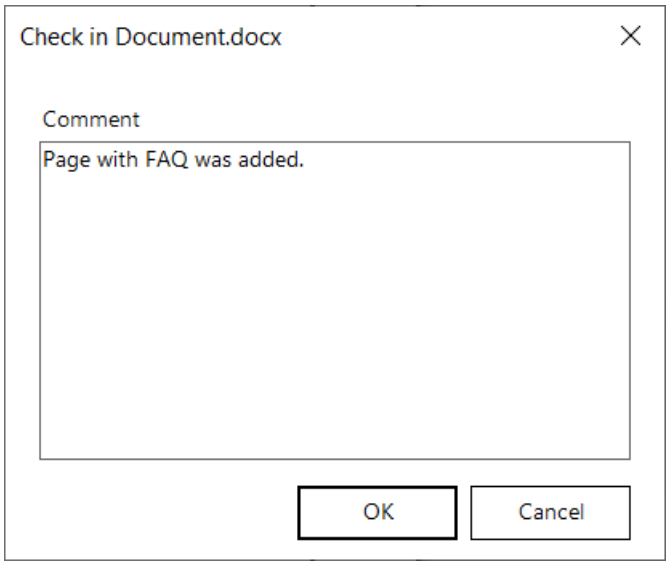
The next step is to edit the document. This can be done by selecting **Open online** from its context menu and editing it online. After the desired changes are made, you can close the browser.



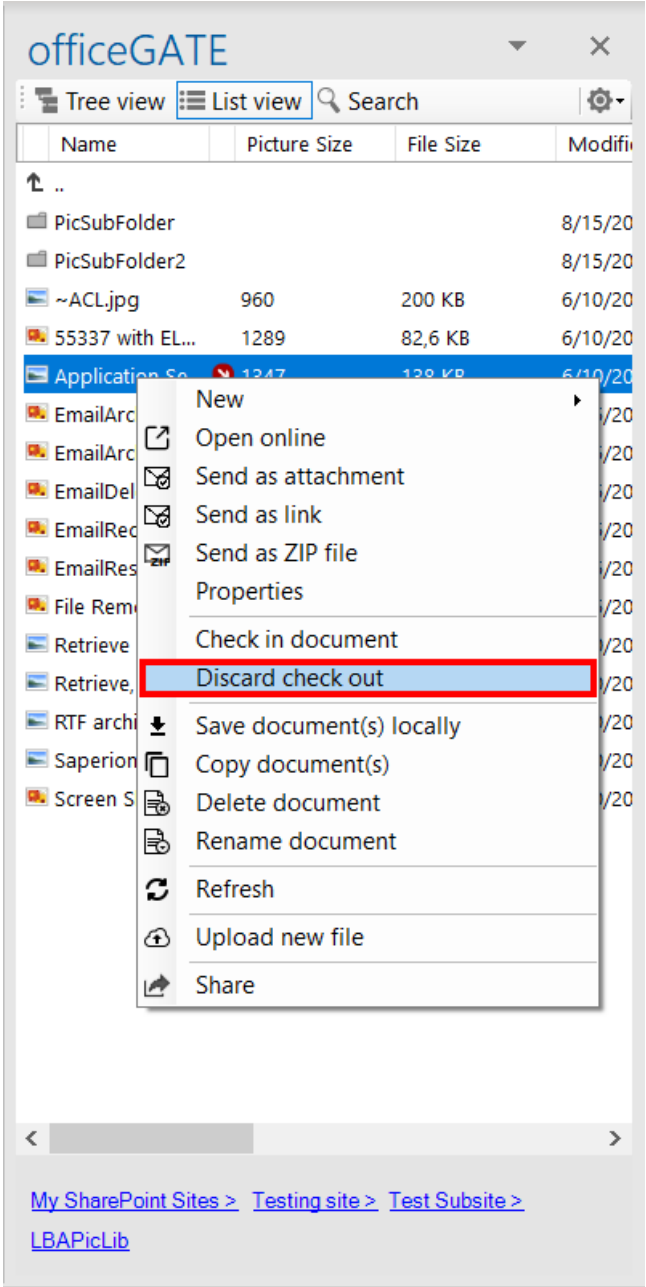
If you want to apply the changes that were made, click on the **Check in document** option. This will also make the document available for other users and create a new version of the document. Older versions and version history can be viewed directly SharePoint, officeGATE always opens **the latest version**.



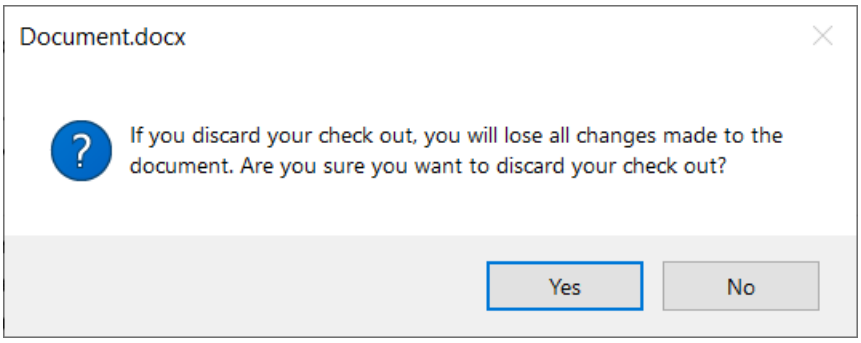
After selecting the **Check in document** option, a pop-up window with the possibility to add a comment will appear. It is recommended to always write down some notes in order to have a better overview later. Click **OK**.



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



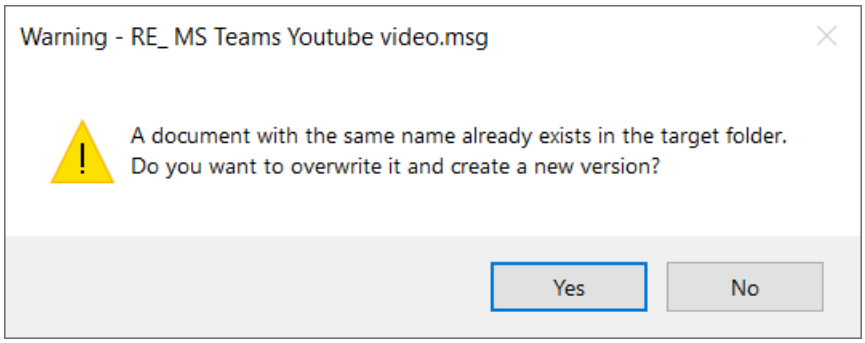
After selecting **Discard check out**, a warning pop-up window will appear. If you confirm that you want to discard the check out, you will lose all the changes that were made while the document was checked out.



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

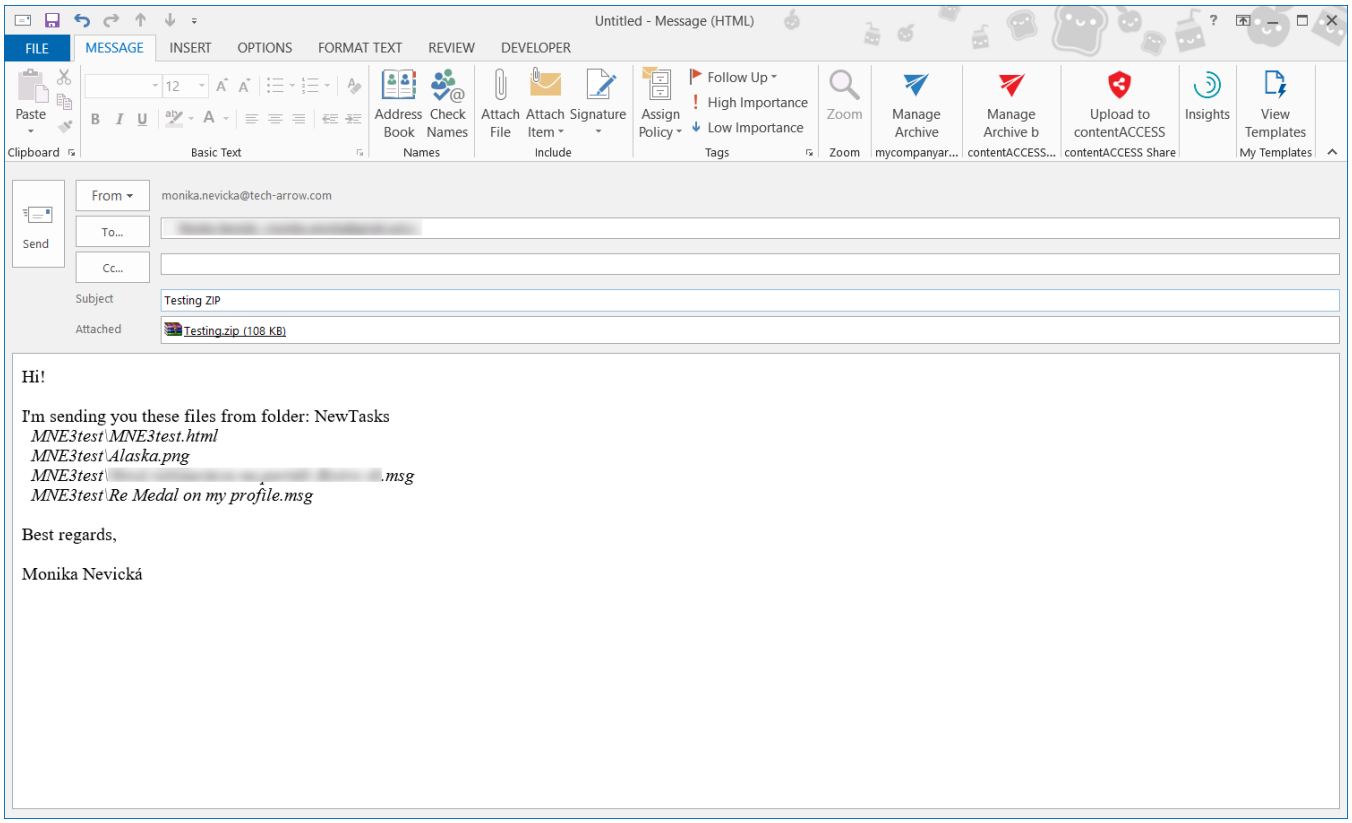
- Library item - create a new message with selected document as attachment
- List item – cannot be sent as attachment from its context menu
- Document set item - create a new message with selected document as attachment

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

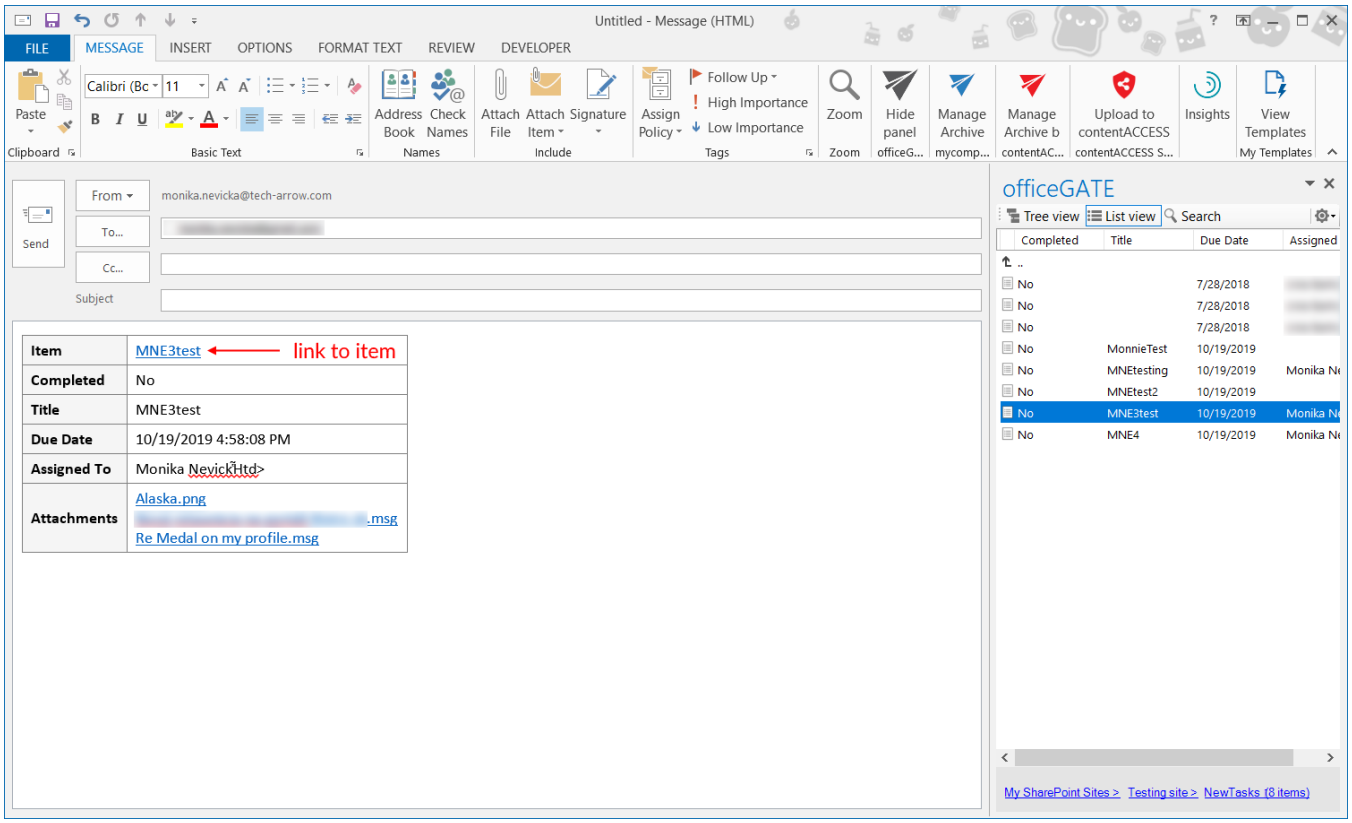
- Library item - put the compressed document into a new message
- List item - compress the item properties into an HTML file together with item attachments to a single ZIP file and put it to a new message



- 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

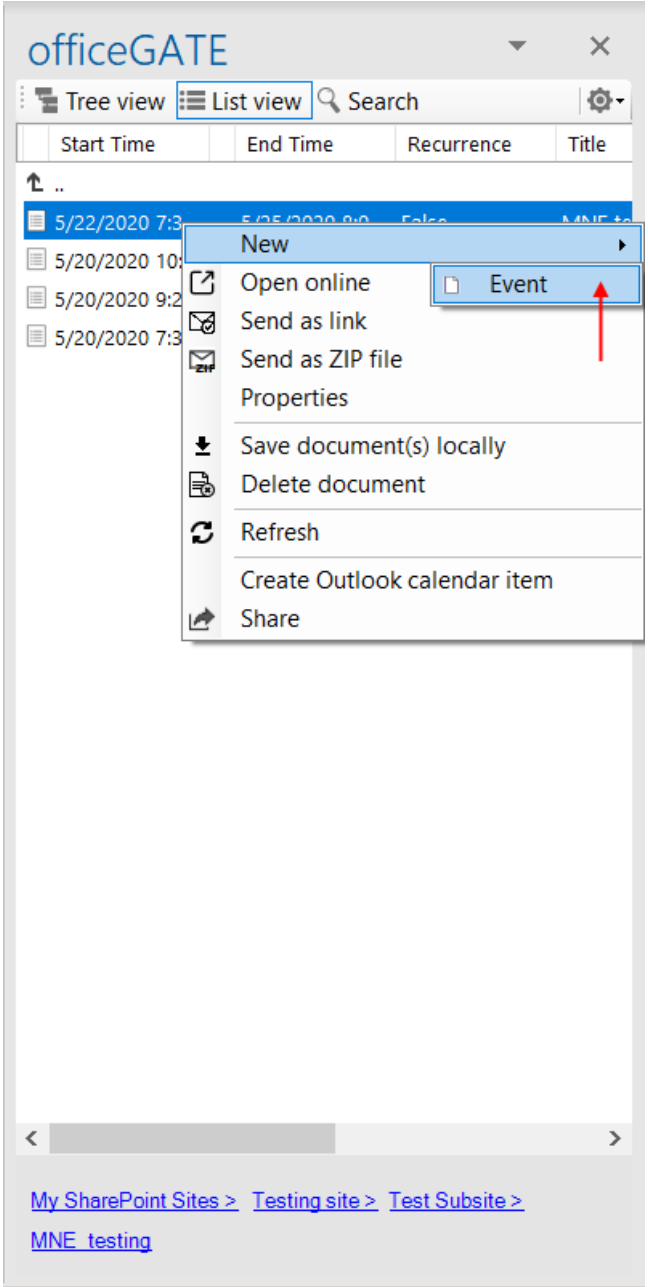


- Document set item - add the document as attachment

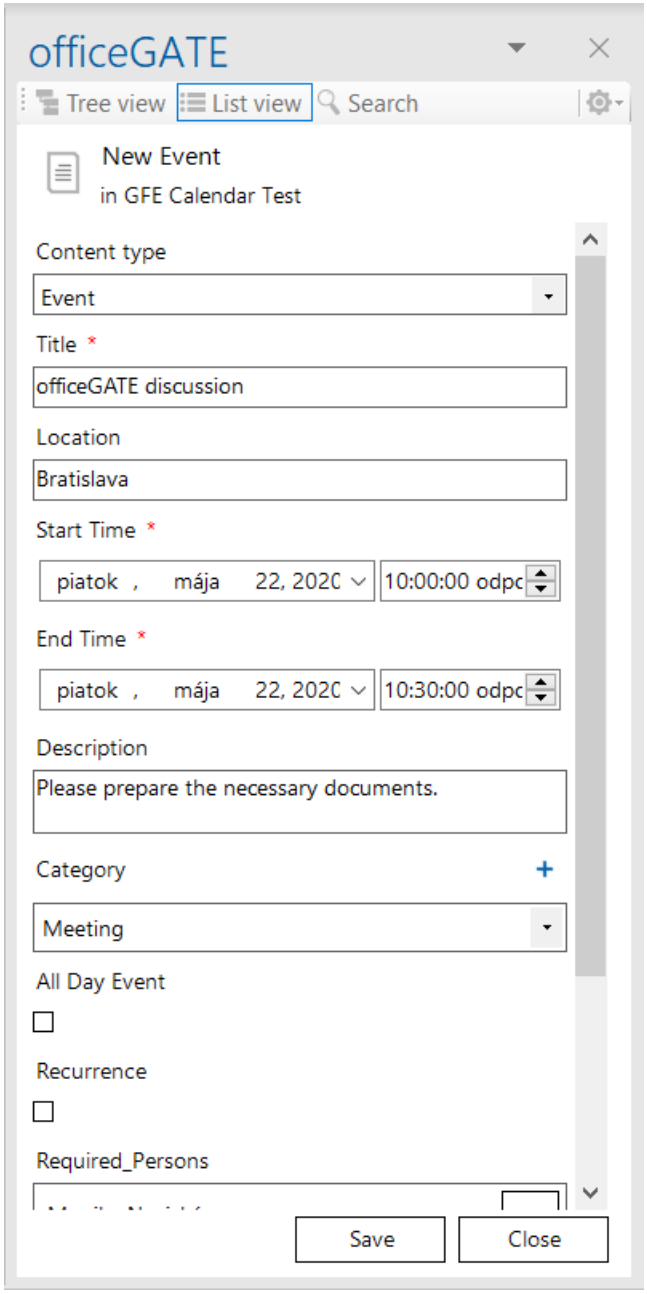
Outlook calendar entry creation

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

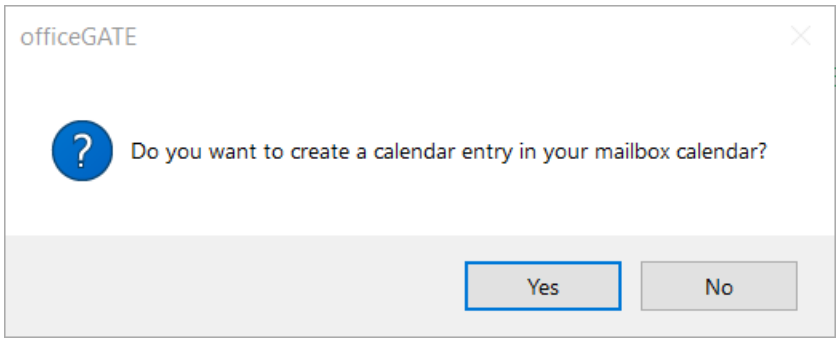
To create a SharePoint calendar entry, right-click on an Events list or list item -> select **New** -> select **Event**.



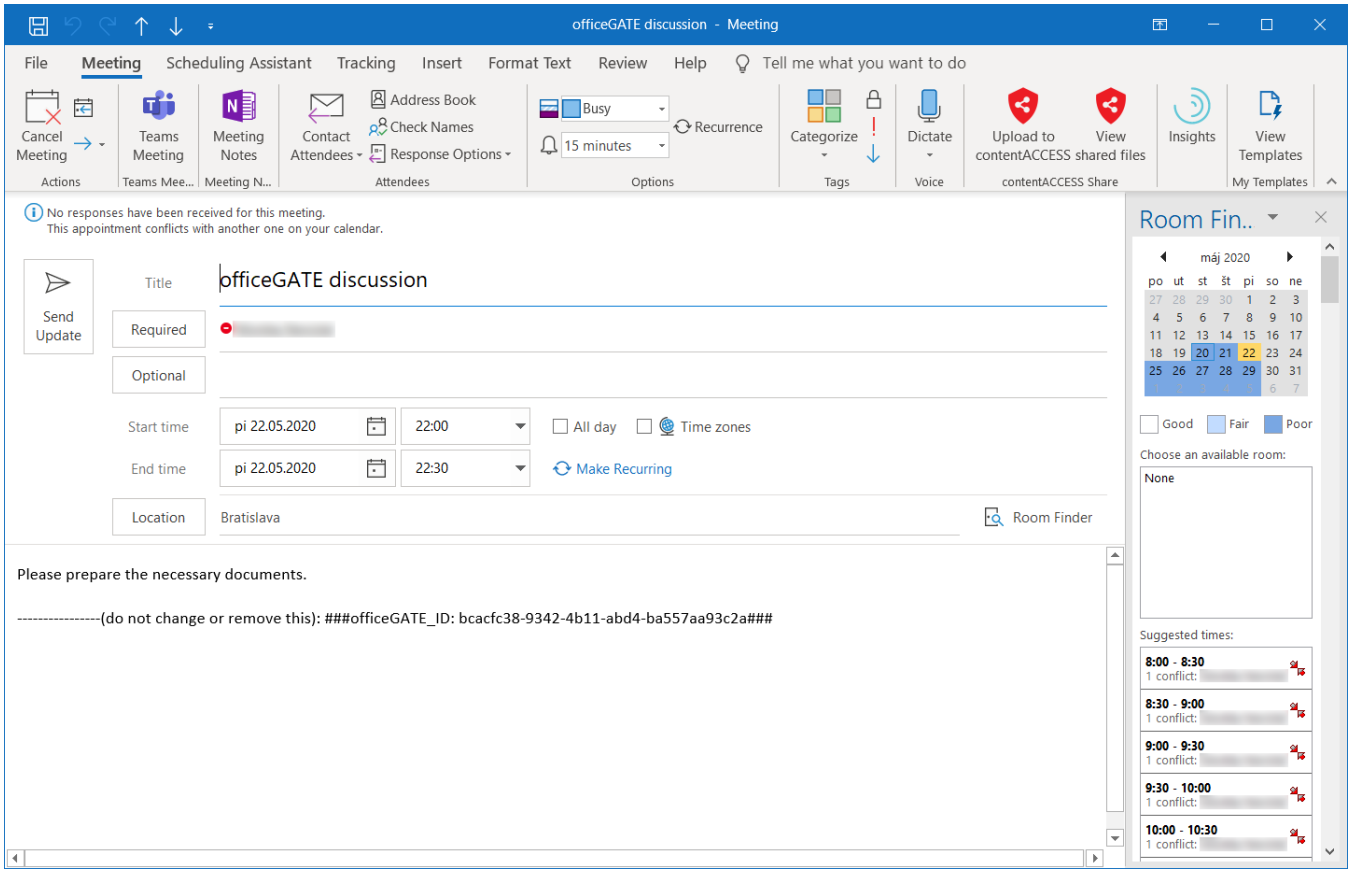
The document metadata dialog will open. Here you need to fill in the required fields (marked with red asterisk). Click on **Save**.



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.



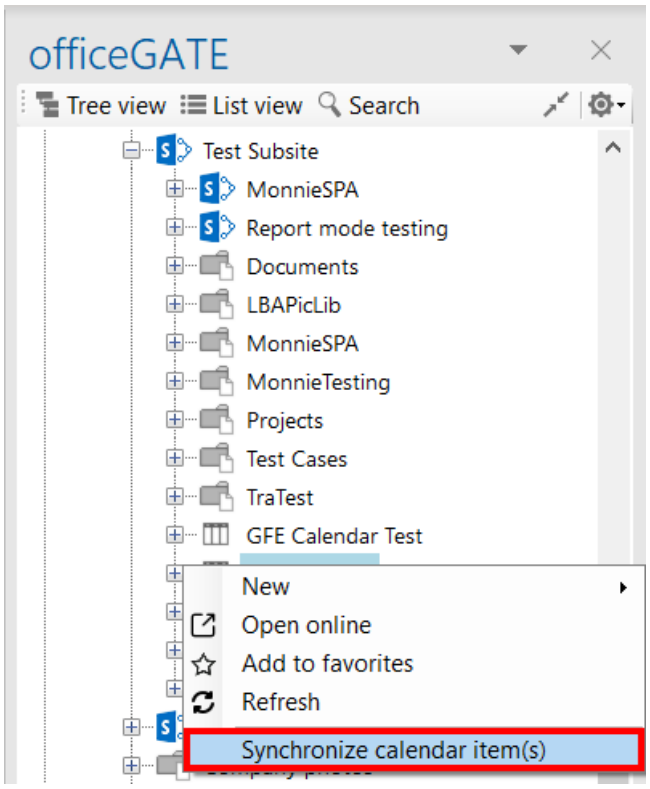
If an existing calendar or task item is edited in officeGATE and does not contain an information about officeGATE ID, then the option to retrospectively create an **Outlook calendar entry** for that item will be visible for the user. Once the entry is created, the **Synchronize calendar item(s)** button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

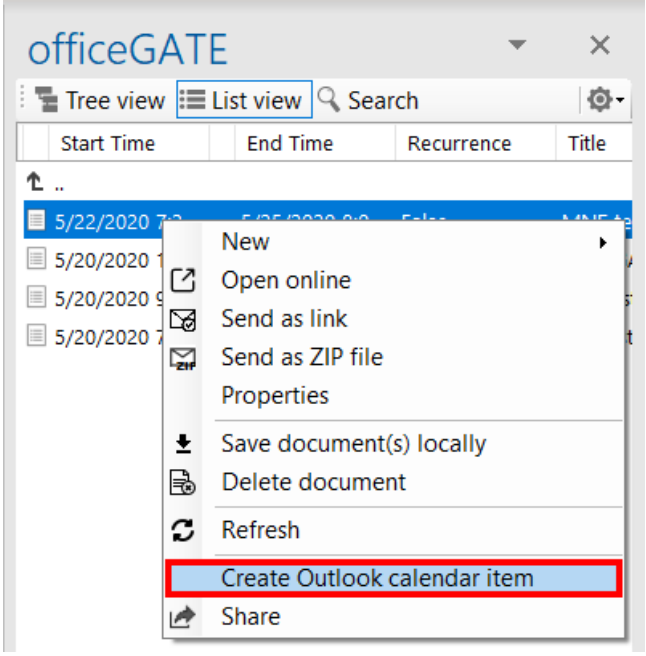
When you click on the option, officeGATE will query all the calendar items of the selected calendar and if the description contains the Outlook calendar ID (mentioned above), the Outlook calendar item will be updated. SharePoint calendar items that don't have the Outlook calendar ID in description will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



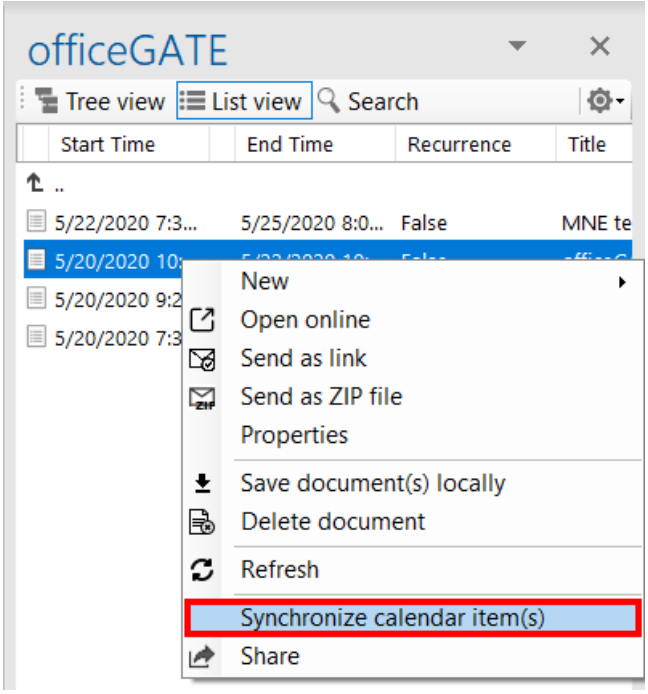
List view

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.



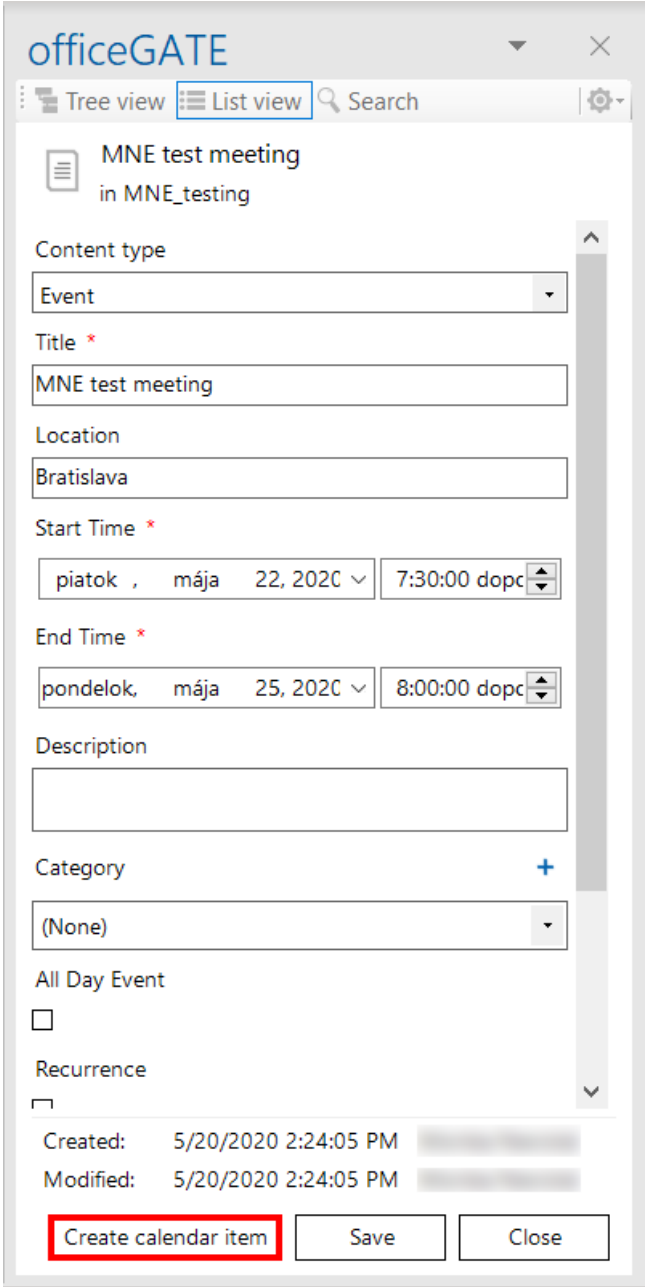
- **Synchronize Outlook calendar item(s)** - this will be visible if you have already created an Outlook calendar item from the selected SharePoint calendar item. When clicked, officeGATE will read the SharePoint calendar item fields and update the Outlook calendar item based on that.



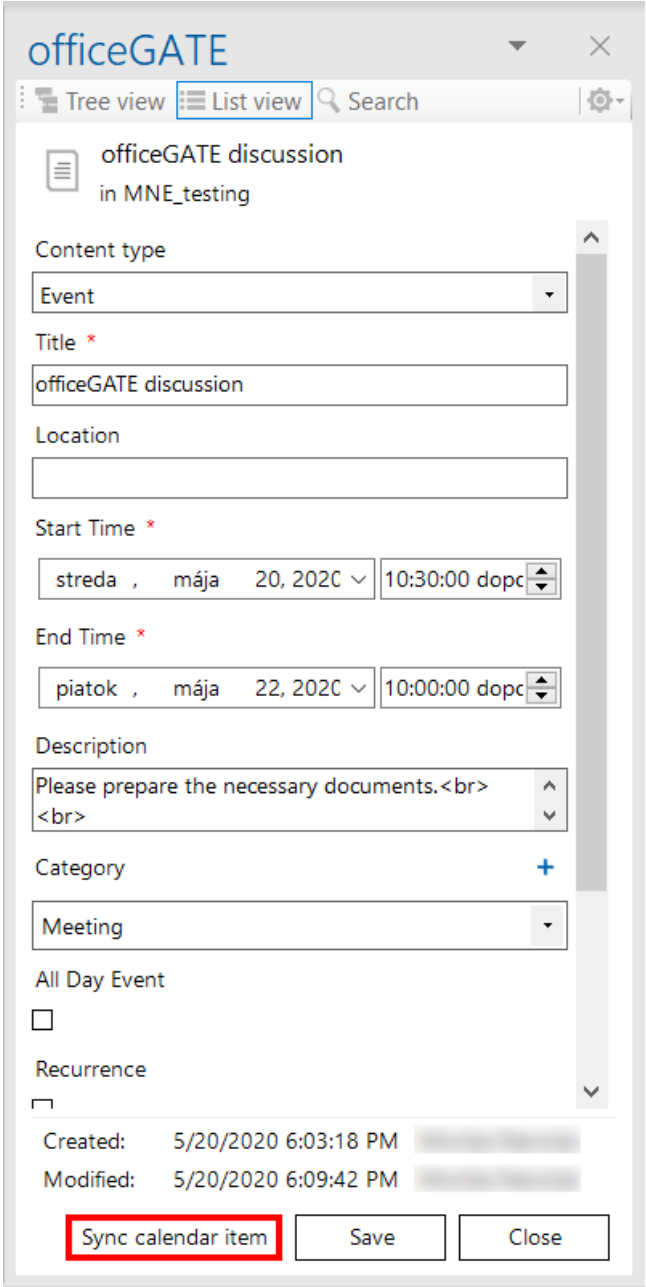
Item details view

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**



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



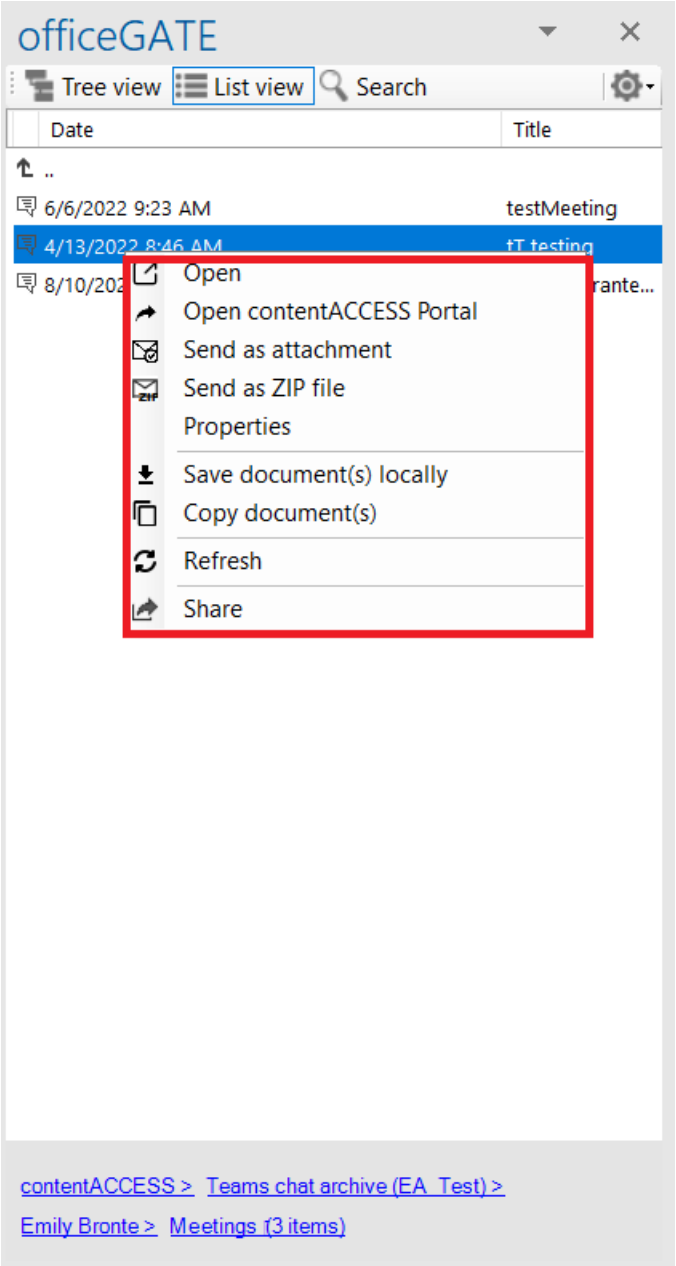
Important: If an item, which has been already synchronized, is deleted from the SharePoint event list, it will remain in Outlook calendar, as there's no synchronizing for the deleted items.

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:

- Open
- 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 Double-click on contentACCESS items in List view
- Save document(s) locally
- Copy document(s)
- Refresh
- Share



Troubleshooting

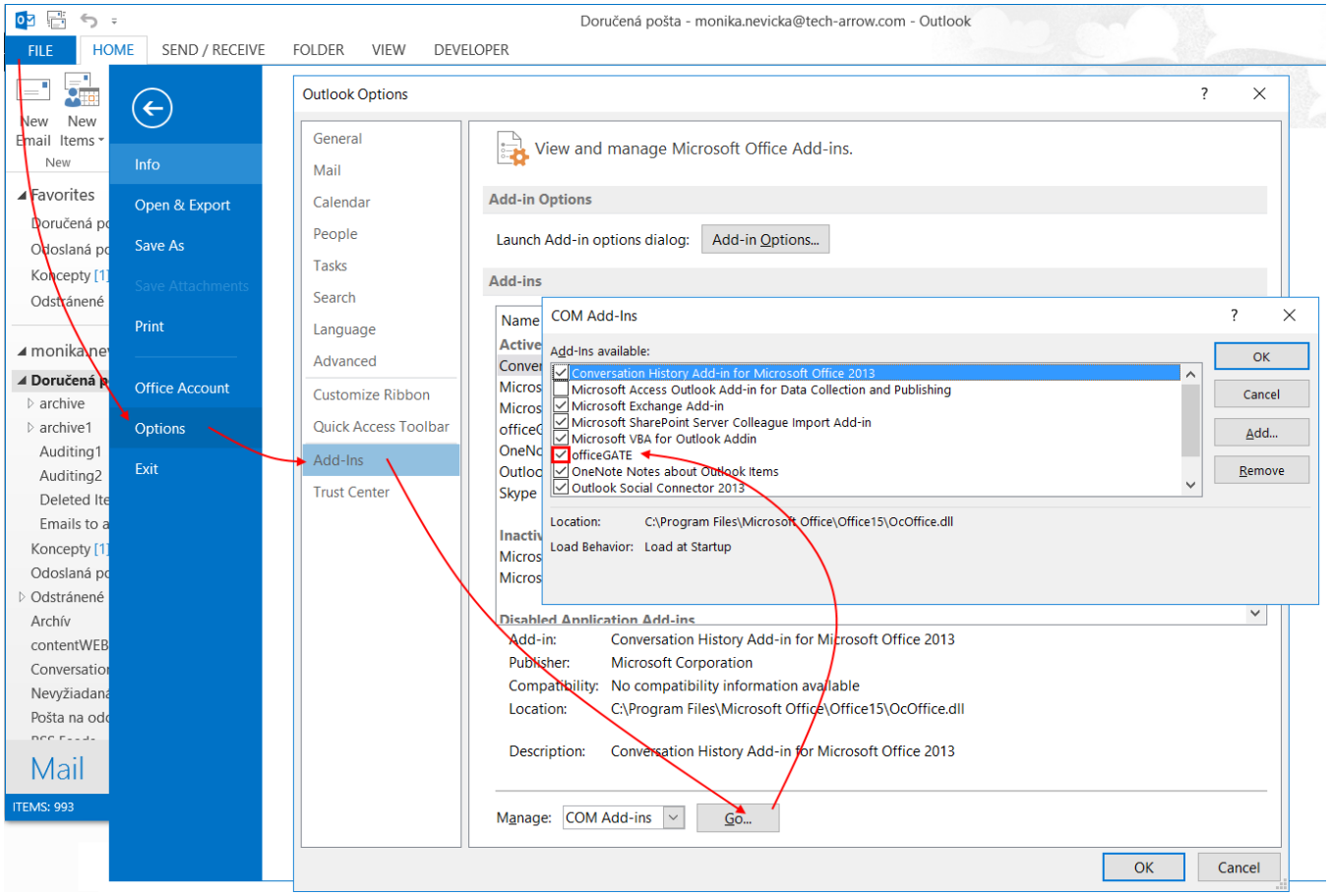
The vast majority of the problems that you might face during working with officeGATE can be solved with nothing more than a few minutes of your time. Section **Troubleshooting** takes you through the typical operating system problems teaching troubleshooting techniques to decipher any problem, and giving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



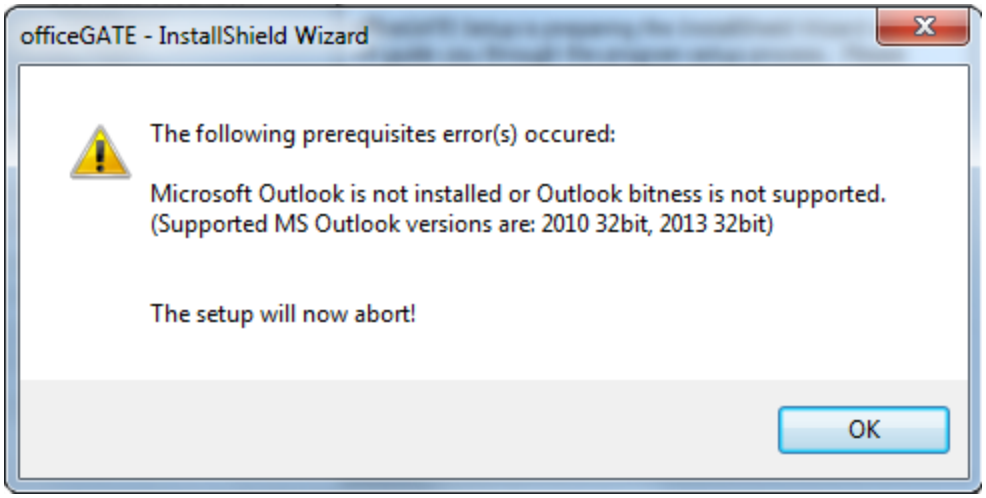
➢ SharePoint connection in officeGATE is not established

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: Connecting to SharePoint site(s)..

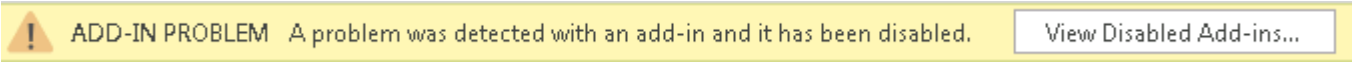
- **What to do if you officeGATE version is not supported by MS Outlook that you have on you PC**

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:



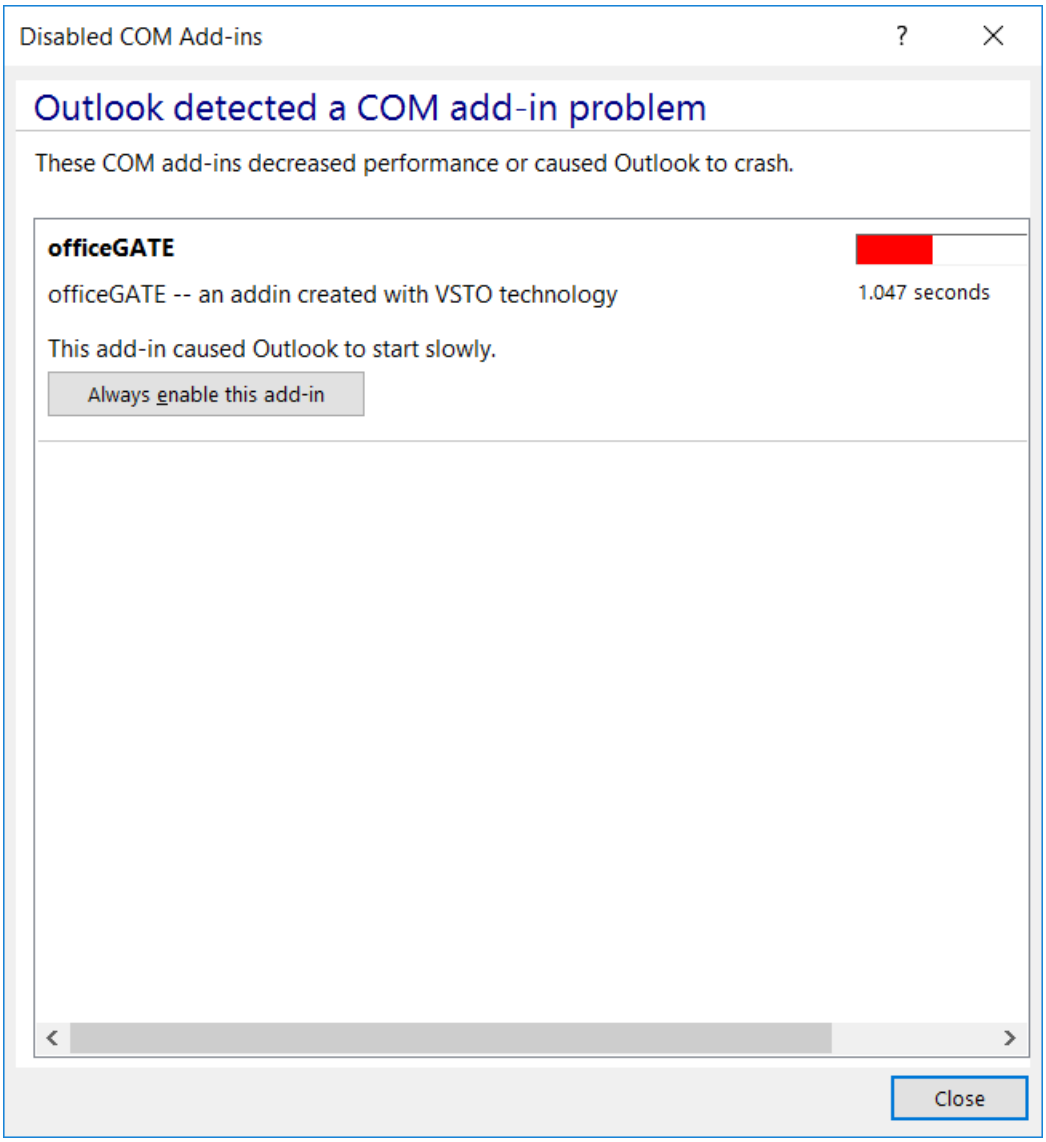
Please download the version of officeGATE which corresponds to the version of MS Outlook that you have installed on your PC.

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



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:



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.