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officeGATE

Manual – version 2.7

MAY 9, 2016

TECH-ARROW A.S.

KAZANSKÁ 5, 821 06 BRATISLAVA, SLOVAKIA

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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.
- ✓ **Search** in title and contents of your documents.
- ✓ **Customize your access with Favorites**. Define your own favorite folders or SharePoint sites.
- ✓ **Connect to multiple SharePoint sites**.
- ✓ Directly from Outlook you can use SharePoint's **content type selection and metadata fill** features.

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✓ **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 Full

https://www.microsoft.com/en-us/download/details.aspx?id=17718

➢ Microsoft Office 2010,2013,2016

➢ Microsoft Windows 8.1, Microsoft Windows 8, Microsoft Windows 7

➢ Microsoft SharePoint Server 2013 Client Components SDK, version 15.4711.1001

https://www.microsoft.com/en-us/download/details.aspx?id=35585

➢ Visual Studio 2010 Tools for Office Runtime*

https://www.microsoft.com/en-us/download/details.aspx?id=48217

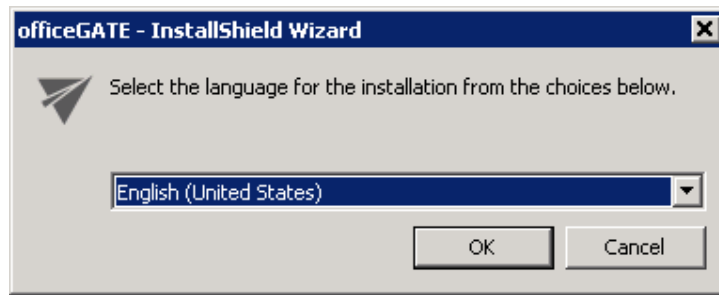*This prerequisite is required for Group Policy installation only.*

Getting started

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

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

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

Single installation of officeGATE

1. Download the setup package (.exe).

2. Select the language for installation from the available languages:

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Hint: By The Group Policy instllallation 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.
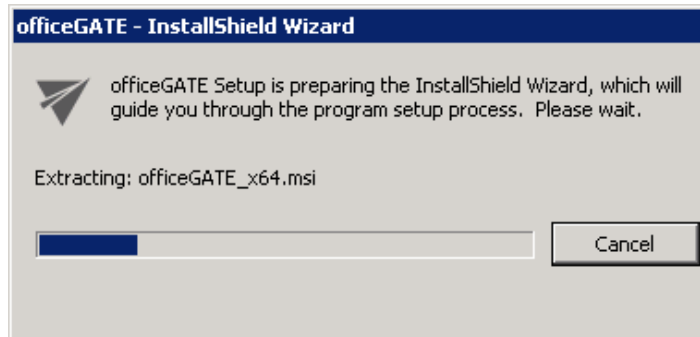
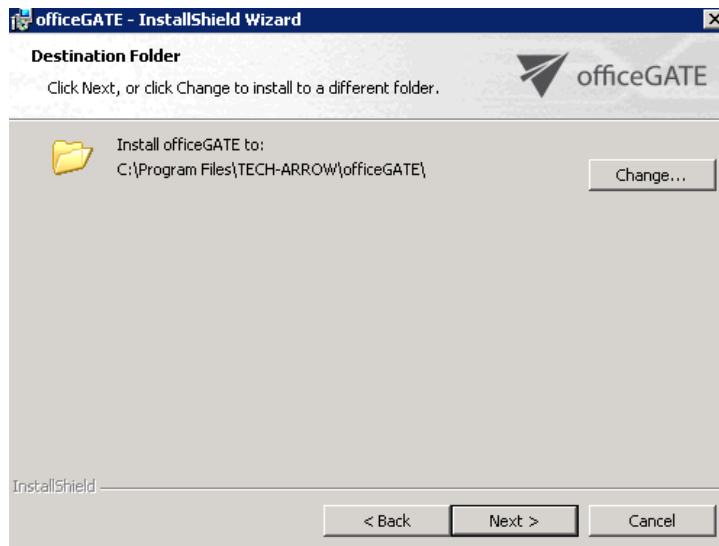4. The officeGATE InstallShield Wizard will appear as shown on the screen below. Click **Next**.
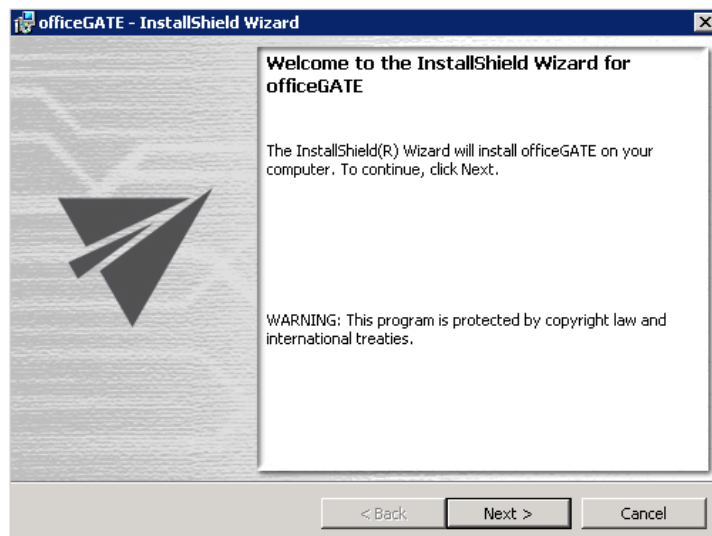
5. In the next step click on **I accept the terms in the license agreement** radio button and click **Next**.

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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.

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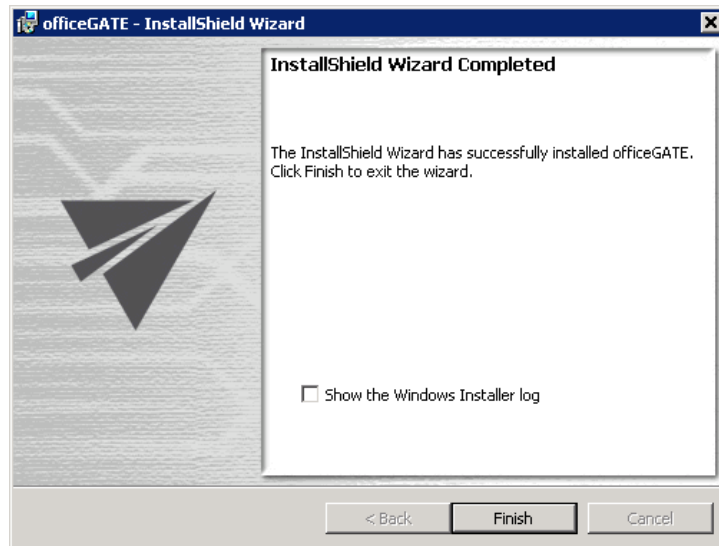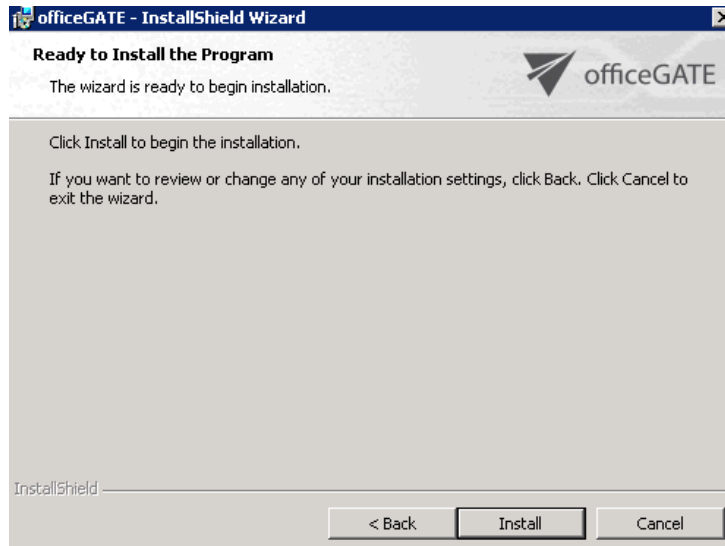
The last window of the installation process will offer for the user to open the Windows Installer log. Wish you check it, mark the "Show the Windows Installer log" checkbox. In case that you would not like to open it leave this checkbox empty.

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

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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.

Hint: You must have system admin rights to install officeGATE using the Group Policy.

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.

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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 <u>this</u> guide.

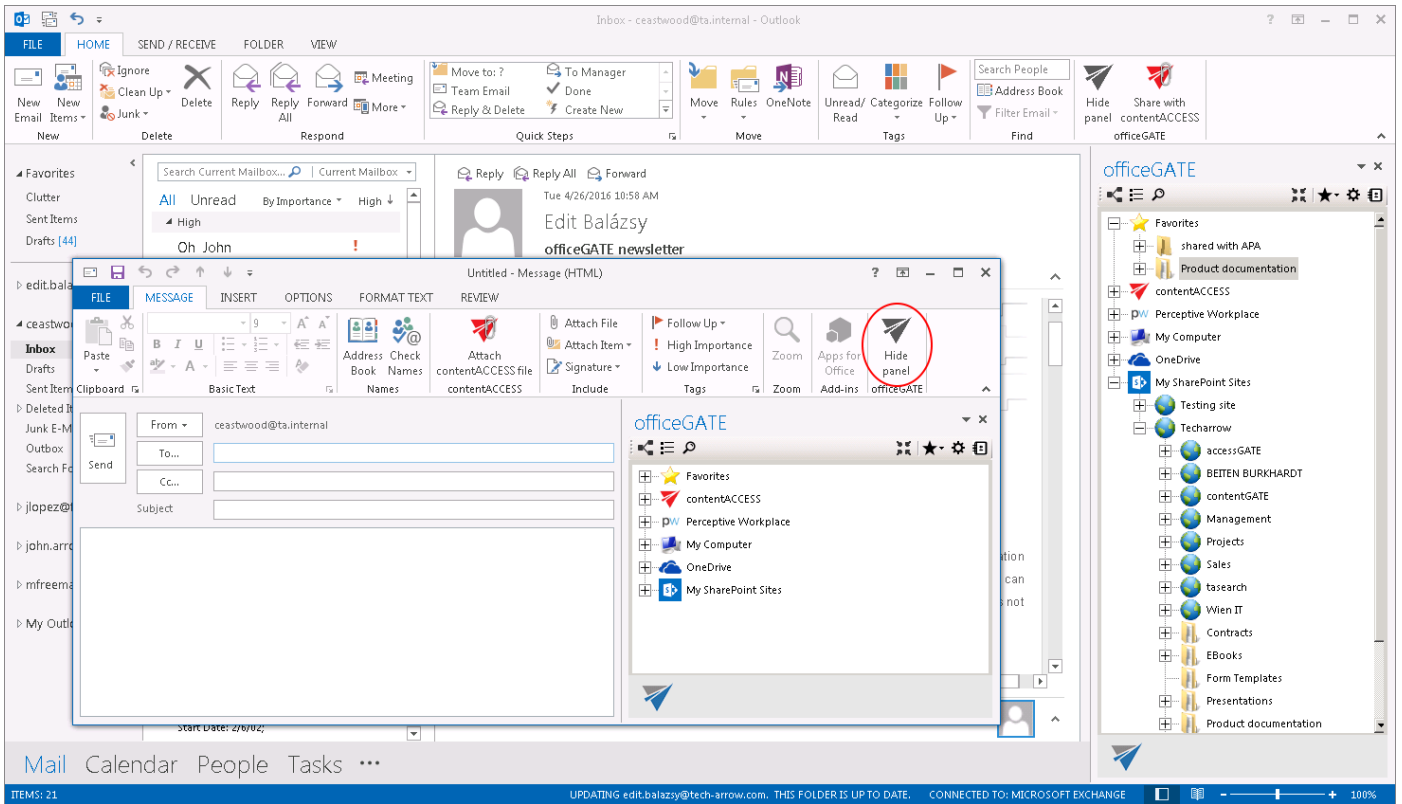3) Finally install officeGATE using Group Policy installation.

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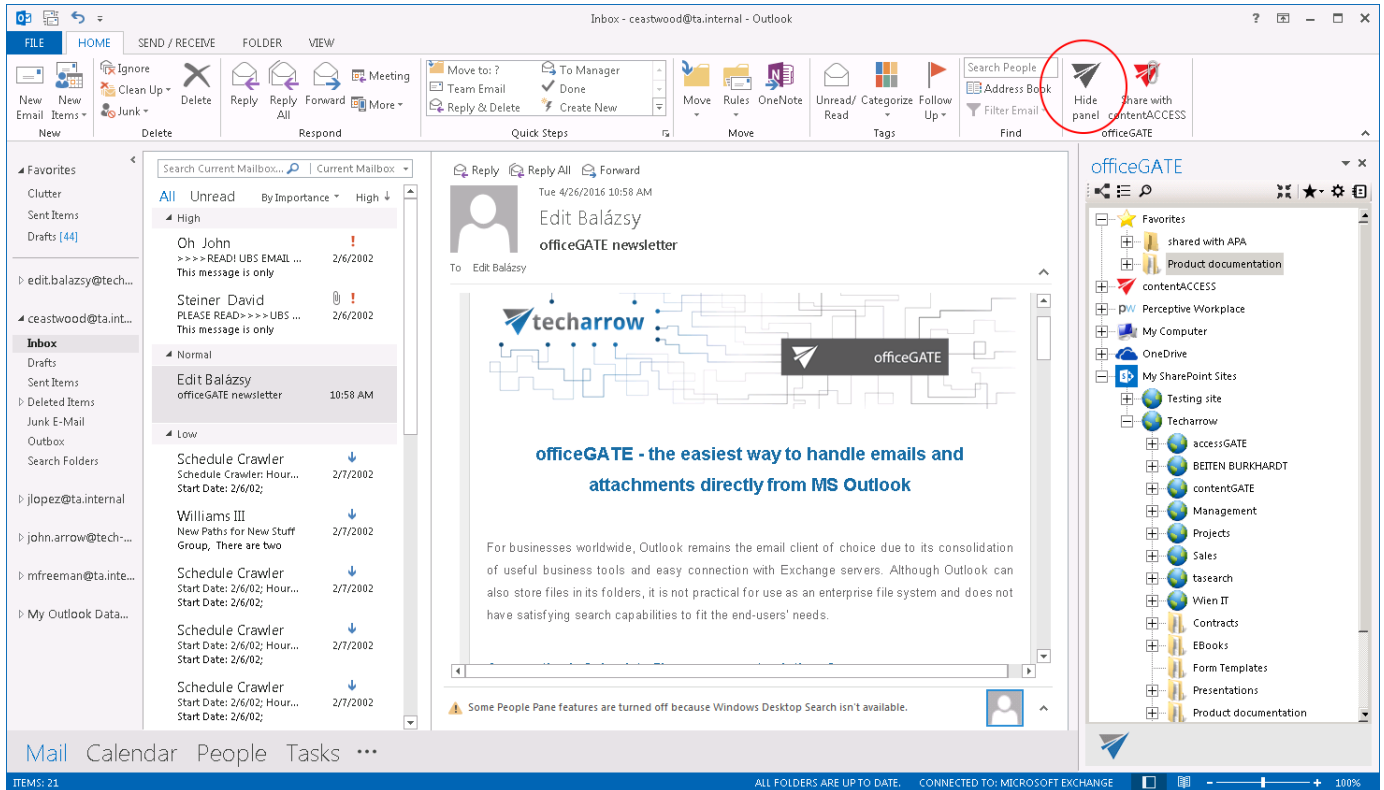
The officeGATE panel can also be accessed in a compose e-mail message window. To show it, click the officeGATE button (⟡) in any message.

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

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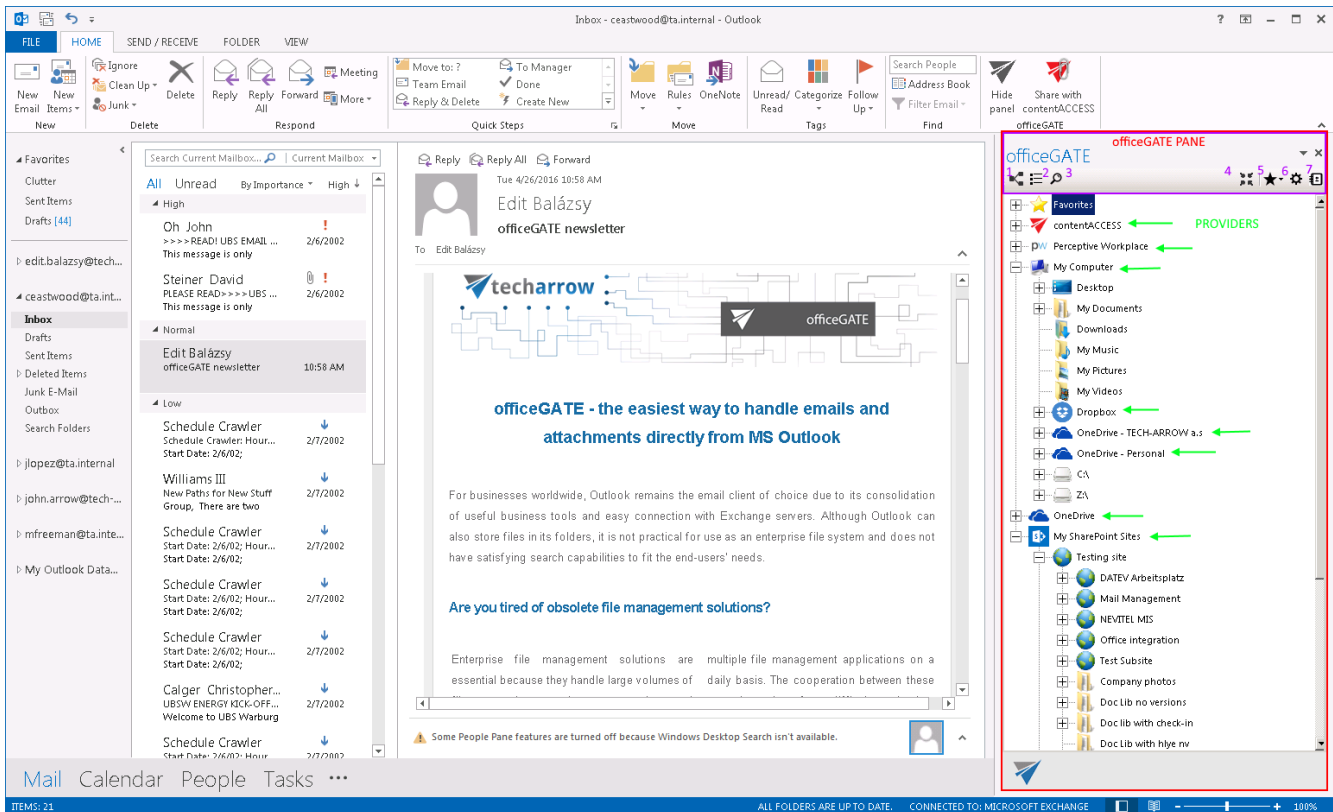
officeGATE pane's overview

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

- View selectors (1. **tree view** , 2. **list view**, 4. **collapse all**) – more details here;
- **Search** (3) – more details here;
- **Favorites collector** (5) – more details here;
- **officeGATE settings** (6) – more details here;
- **Feedback message** (7).

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.

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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) with clicking "Connect" in the context menu.
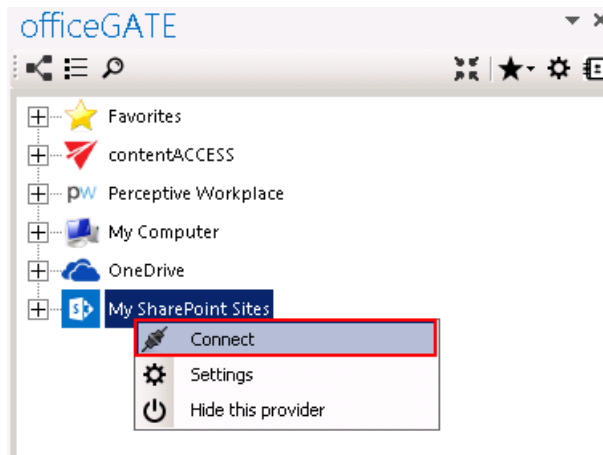
## Enabling/disabling providers

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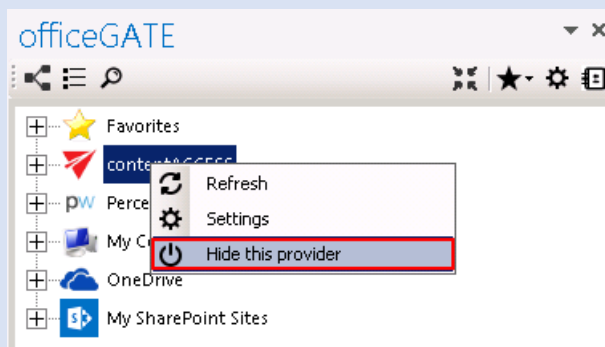
Enabling/disabling the officeGATE providers. In the officeGATE's pane click on ⚙ **Settings** as shown on screenshot below. In the **officeGATE Settings** dialog switch to the 🔵 **Providers** tab. All available providers (contentACCESS, Perceptive Workplace, My computer, OneDrive, SharePoint) are listed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

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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 Connection settings.
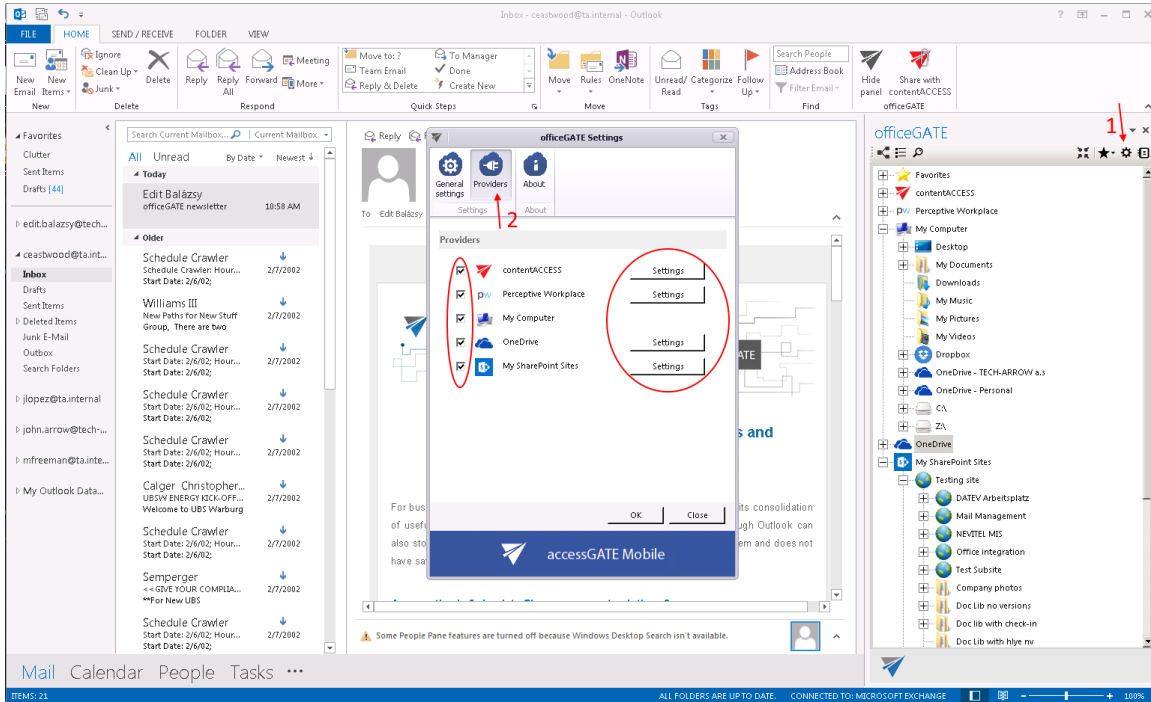

Note: You can hide the providers using the provider's context menu as well. Right click on the provider in the pane and select ⏻ **Hide this provider** from the context menu items.

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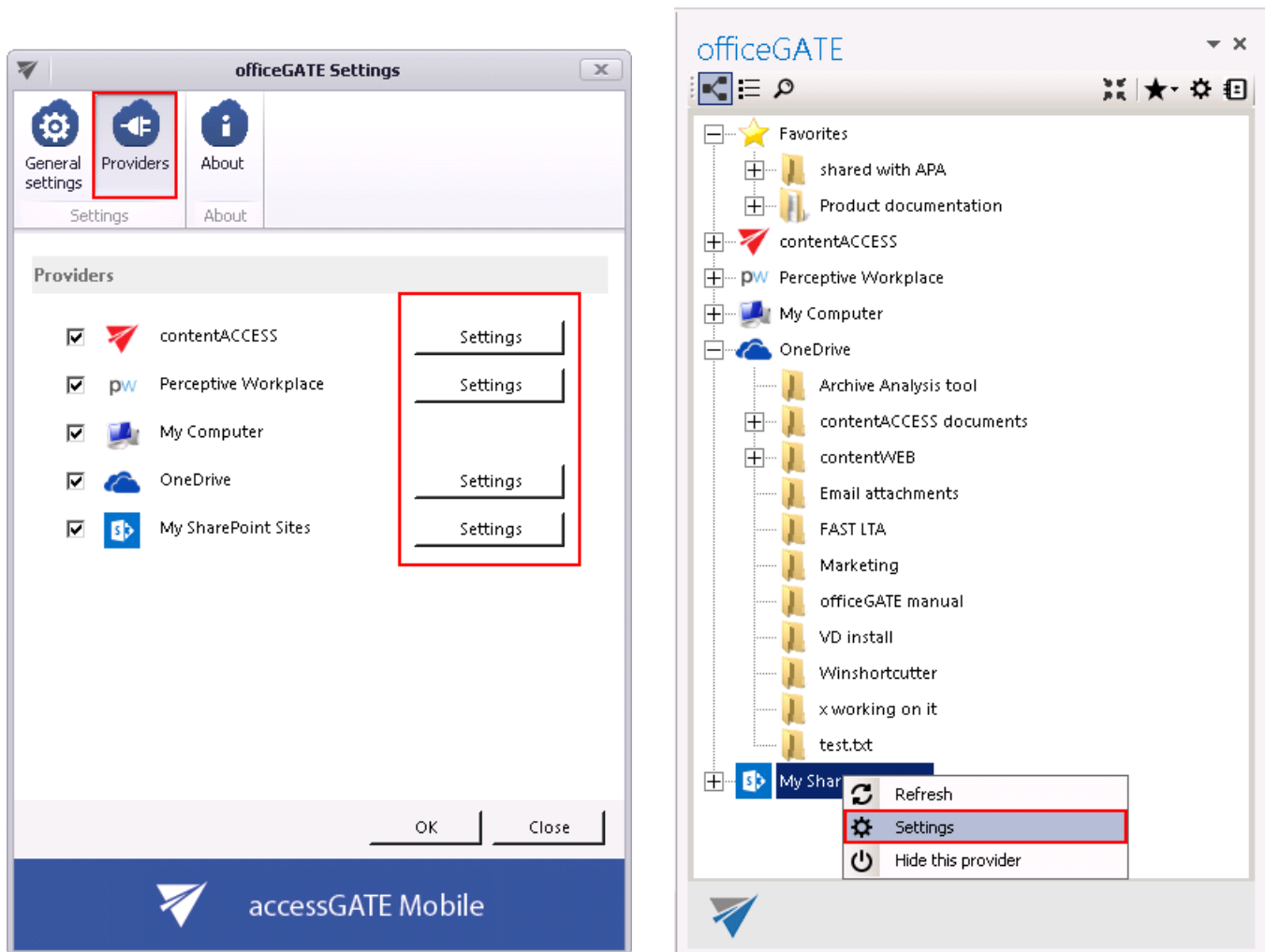
With clicking on "**Settings**" the provider's connection dialog opens. Each provider requires to specify different connection parameters, which will be described in the following subchapters of this guide.

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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: officeGATE version 2.7 works only with contentACCESS 2.9 or higher, lower versions are not supported.

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;

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

   ▪ Enter your **contentACCESS credentials** (Login name and Password);

   ▪ Specify a maximum item count that should be displayed in the list view (by default this is set to 50)

   ▪ Specify a maximum number of lookup items (by default the value is set to 20).

   ▪ Specify your default sharing settings on the **Sharing tab** (the option is available if contentACCESS Sharing plugin is licensed; more information [here](#))

   ▪ Check the connection via the "Test connection" button and save your settings.

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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 item count that should be displayed in the list view (by default this is set to 50)

- Specify a maximum number of lookup items (by default the value is set to 20).

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- Specify your default sharing settings on the **Sharing tab** (the option is available if contentACCESS Sharing plugin is licensed; more information here)

- Check the connection via the "Test connection" button and 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);

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- Specify a maximum item count that should be displayed in the list view (by default this is set to 50)

- Specify a maximum number of lookup items (by default the value is set to 20).

- Specify your default sharing settings on the **Sharing tab** (the option is available if contentACCESS Sharing plugin licensed; more information here)

- Check the connection via the "Test connection" button and save your settings.


Note: The log in to contentACCESS with a Windows account is also supported. To connect with it select **Windows** from the **Authentication type** list and enter the credentials. To log in under the currently logged Windows user check the **Current user** radio button and the user credentials will be filled in automatically.
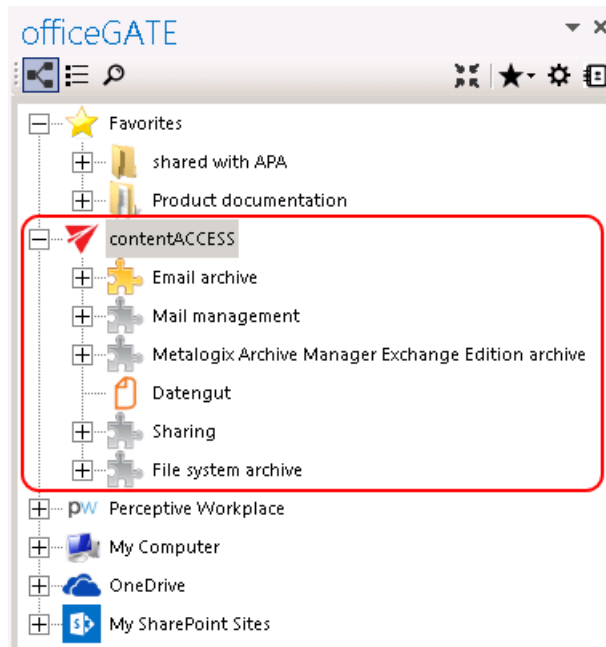
The Windows user login must be configured in contentACCESS Central Administration.

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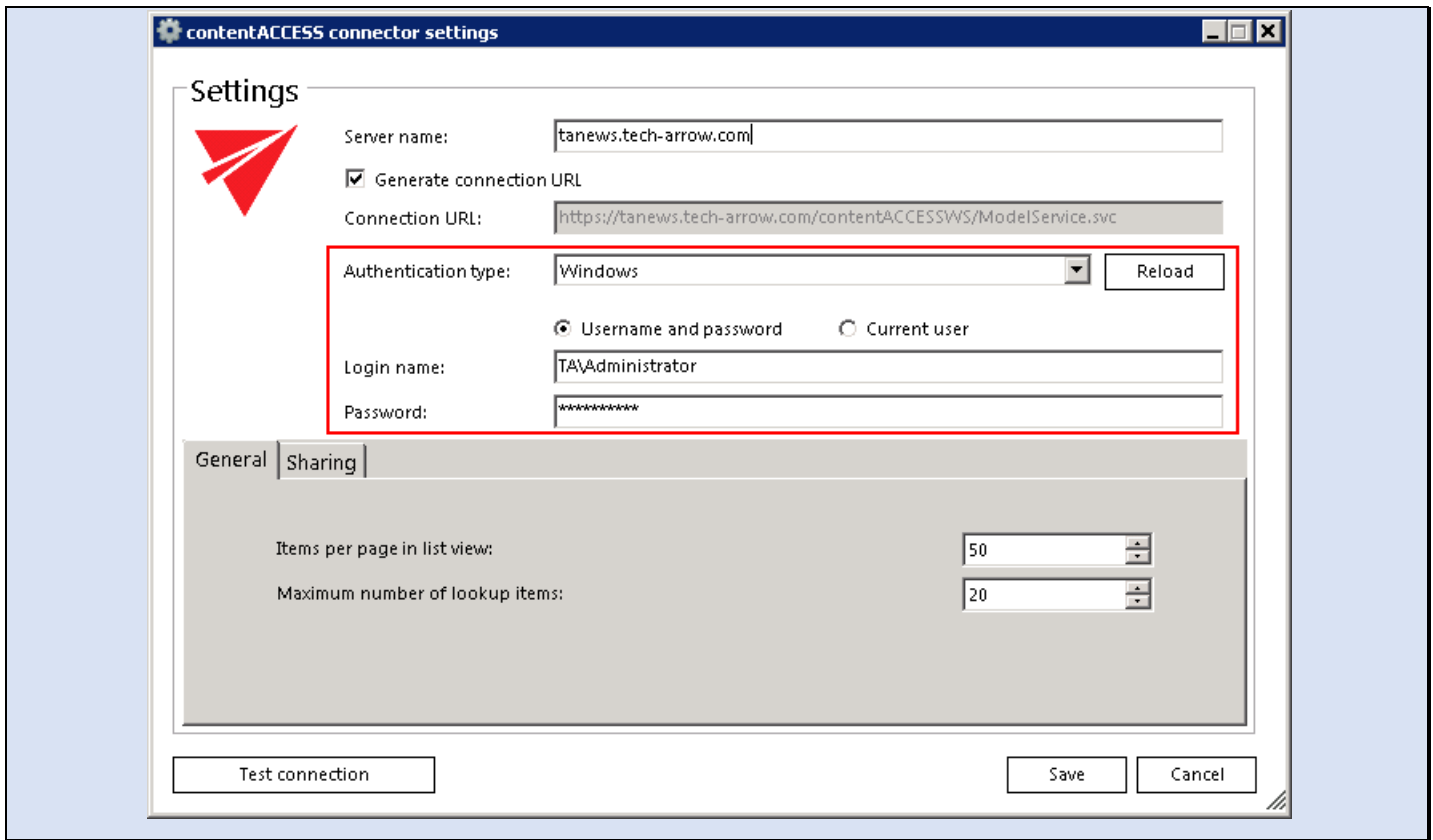
Provided that the connection settings are well established, open the provider's context menu and select "Connect" from the list:
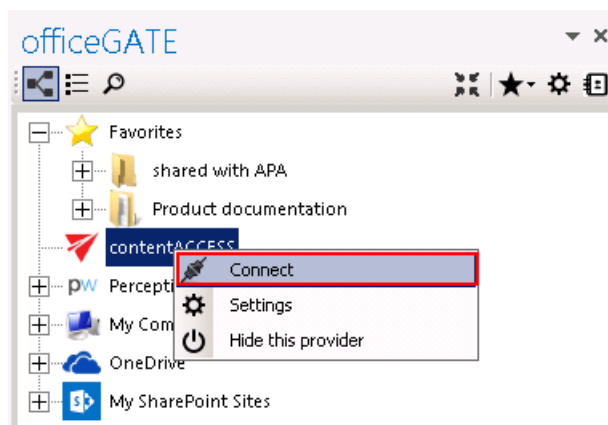
Once the connection is well established, the licensed plugins will be listed when extending the contentACCESS provider's node in the pane:

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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.)

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.
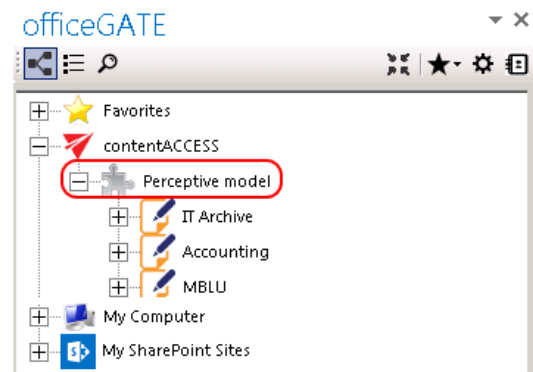
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How to connect to the Datengut/Perceptive DMS in officeGATE. Click on ◥contentACCESS node in the pane, open its context menu and choose ⚙ **Settings** from the list. The **contentACCESS connector settings** dialog opens. Configure here the following sections:

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

- Specify the correct connection URL;

- Select the Datengut/Perceptive **Authentication type**.

- Type in your already existing Datengut/Perceptive user logins.

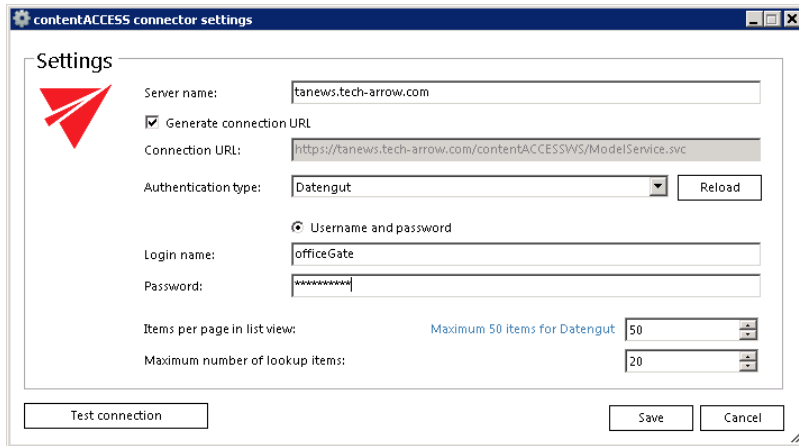- Check the connection via **Test connection** button and click on **Save**.

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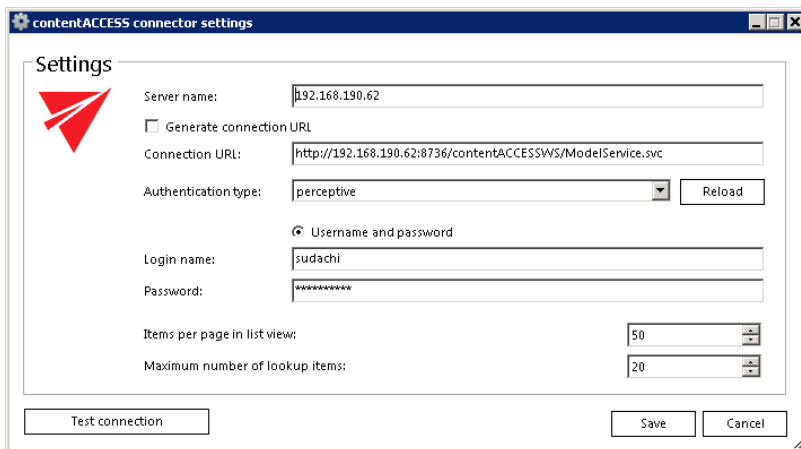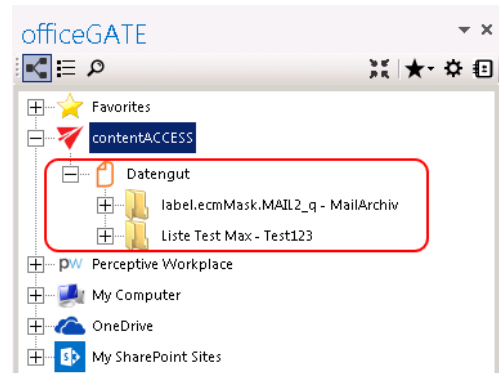

Screenshot A: Establishing the connection with the Perceptive model   Screenshot B: Perceptive node in tree view

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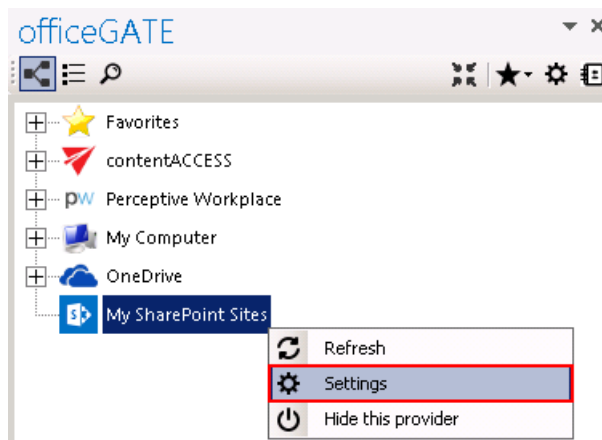| Screenshot A: Establishing connection with Datengut | Screenshot B: Datengut node in tree view |

Connecting to SharePoint site(s)

The following SharePoint versions are supported by officeGATE:

• Office 365, SharePoint 2013, SharePoint 2010

• Foundation

Open the **SharePoint connector settings** dialog with clicking on "**Settings**" in the [SP] SharePoint node's context menu (or in **officeGATE settings** dialog → **Providers** tab).

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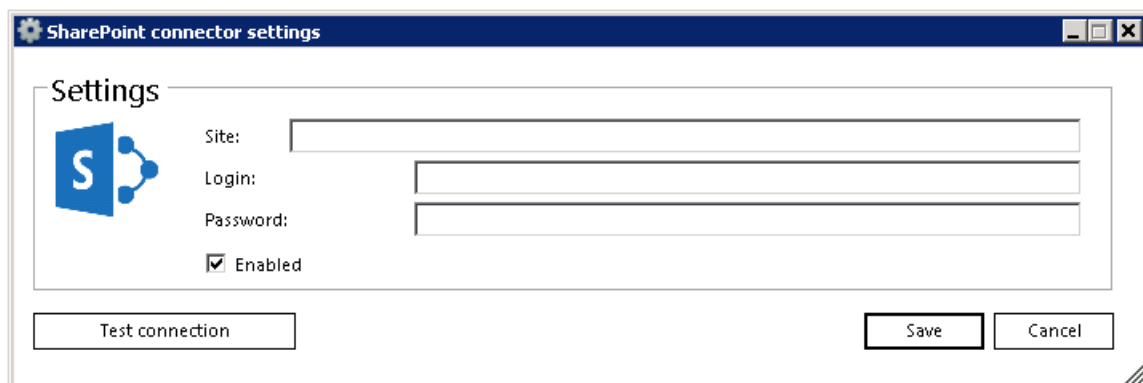
officeGATE supports the connection to multiple SharePoint sites. The already connected sites are listed in the **SharePoint connector settings** dialog. This dialog is empty when connecting to a SharePoint site for the first time. To add a new site to the list, click on "**Add new site**" button.
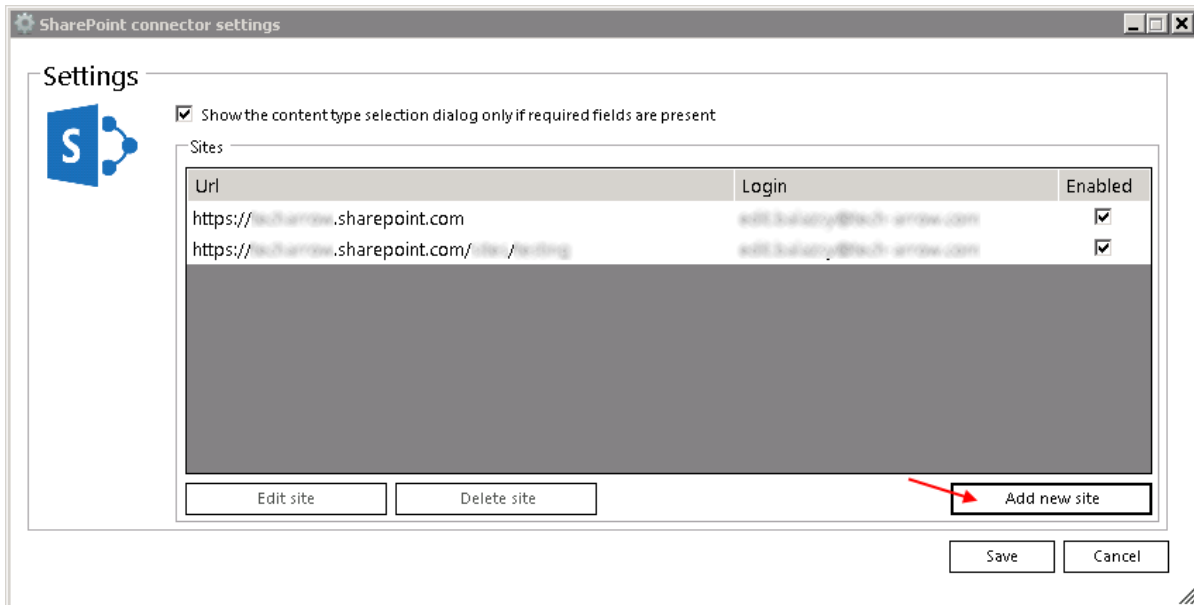
A new dialog (like on the picture below) will automatically open. In this dialog you need to specify the site that you want to connect to. Fill in the **Site** URL and enter **Login** with the corresponding **Password.** Further check the connection with clicking the **Test connection** button and then click Save.

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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.
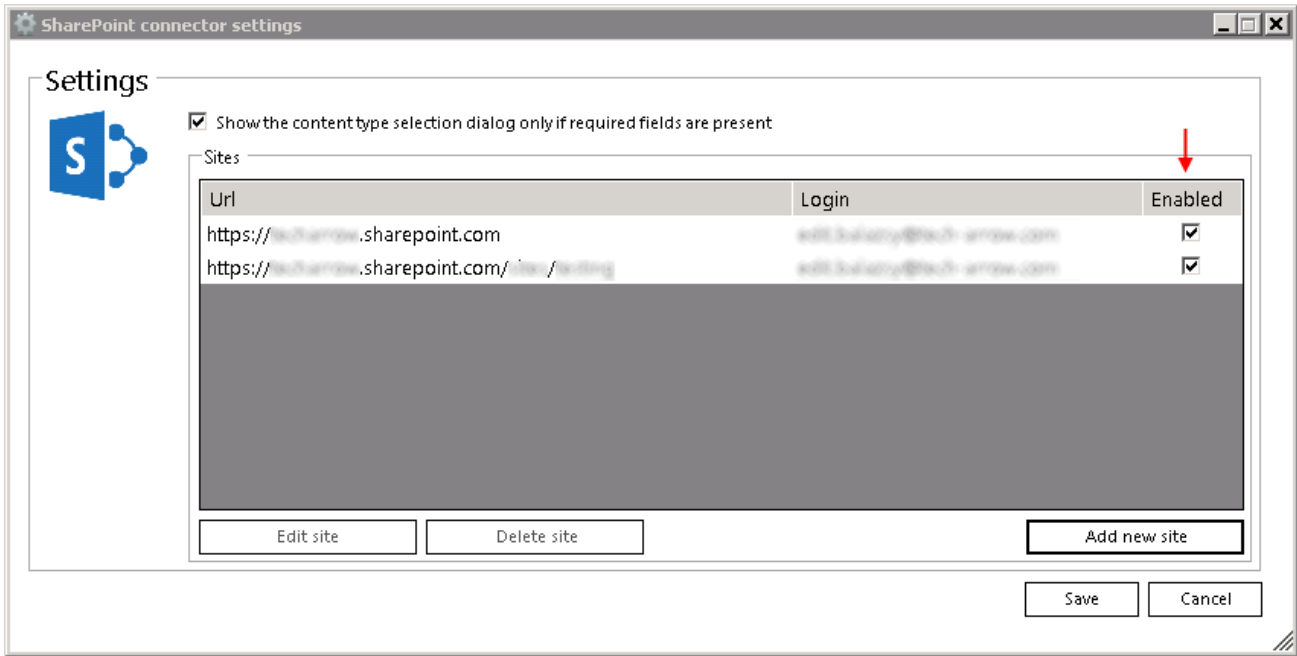

Editing SharePoint sites

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).
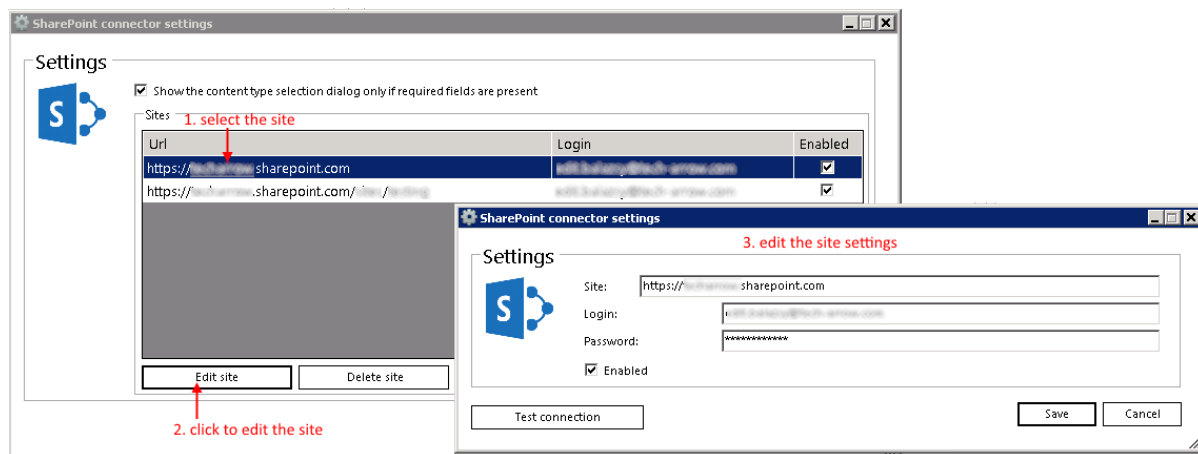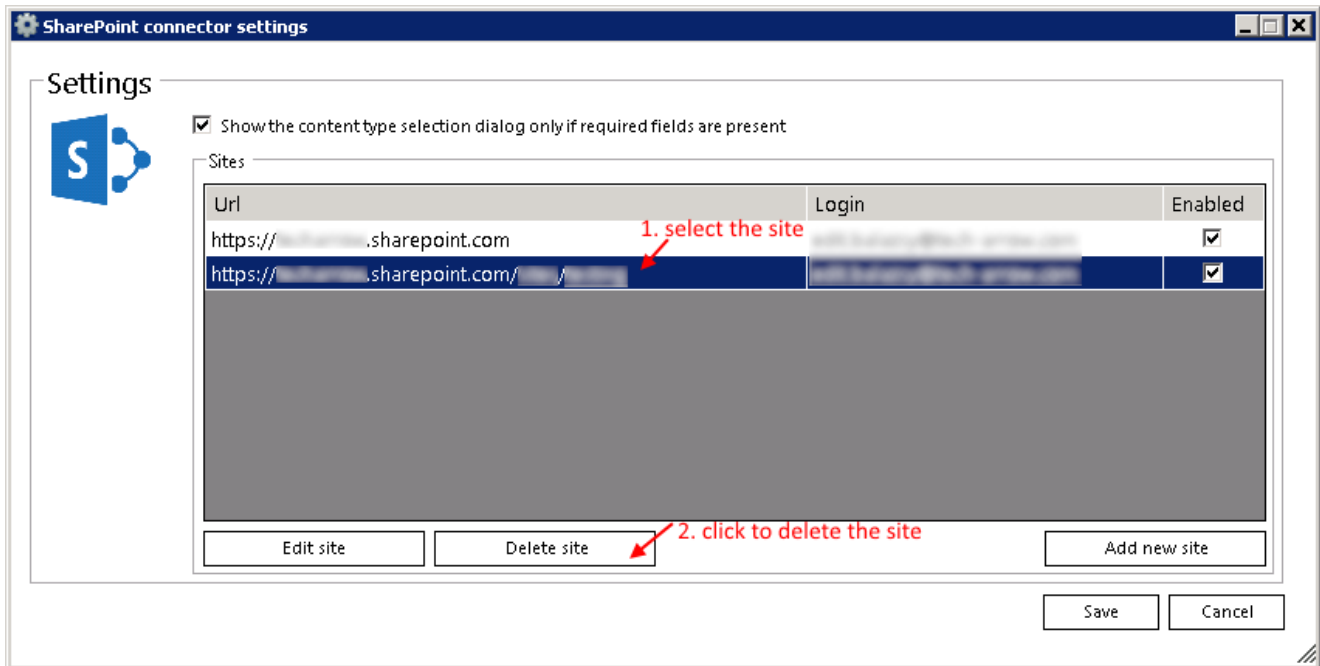

Screenshot A: Editing SharePoint site's settings

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

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SharePoint 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.

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Connecting to Perceptive Workplace

With Perceptive Workplace, you have a very straightforward and rapid way to share documents with coworkers, partners, and customers. The Perceptive Workplace documents can be handled directly from MS Outlook using officeGATE.
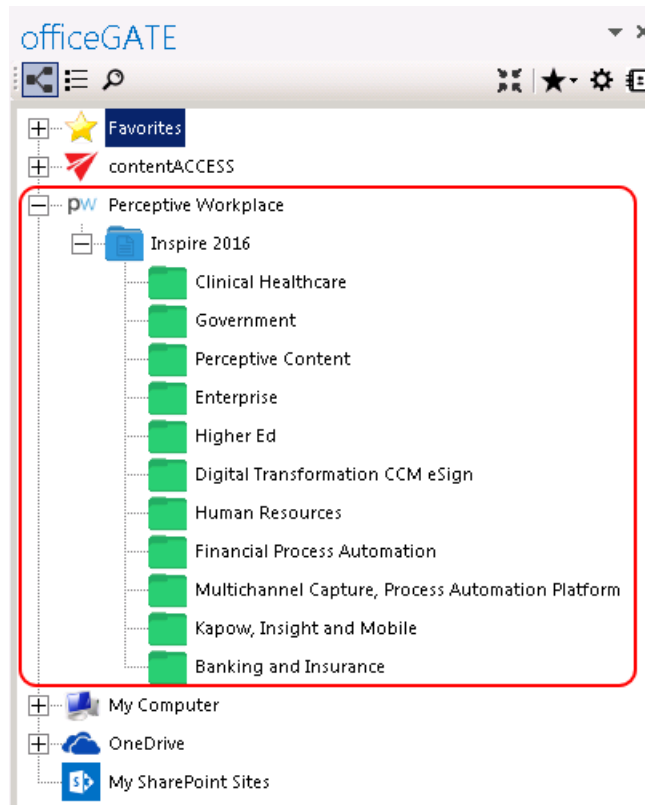
To connect with the file system open the **Perceptive Workplace connector settings** window from the node's context menu like on the screenshot below (or from **officeGATE settings → Providers** tab).
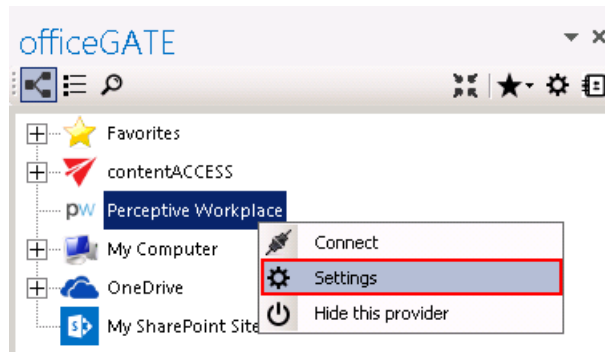
In the pop-up window fill in the **Site URL**, enter **Login** and **Password** then click **Save**.
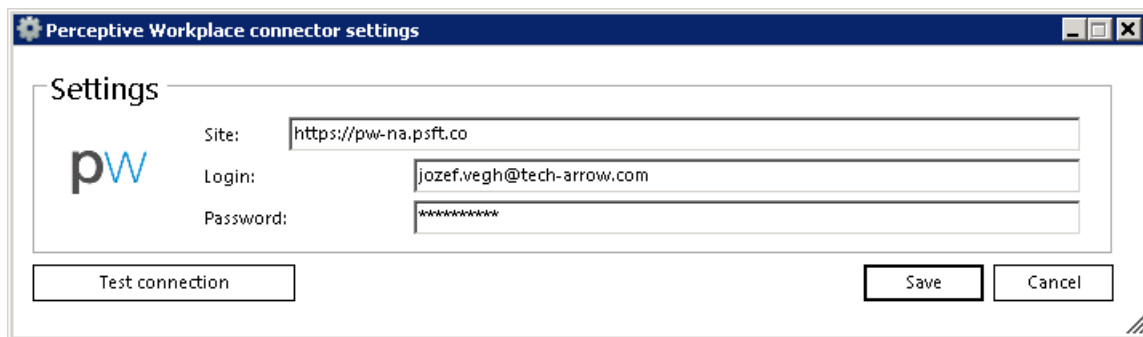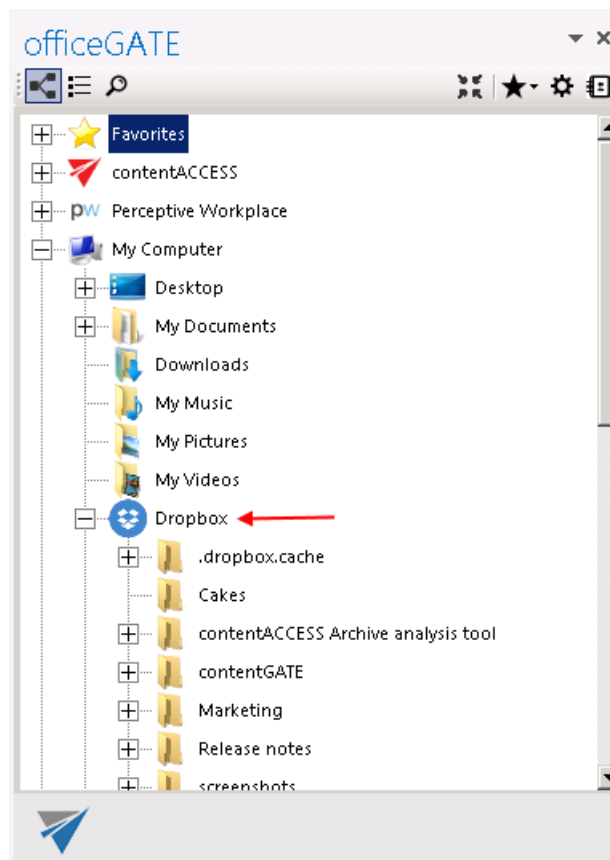

After the connection has been established you can start to work with your folders and subfolders. Click on ⟳ **Refresh** button in the context menu to refresh already updated folders/subfolders.

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![techarrow logo]

Connecting to Dropbox

Who use Dropbox know that all files, photos, videos that are saved in Dropbox will be automatically saved to the computer also. 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.

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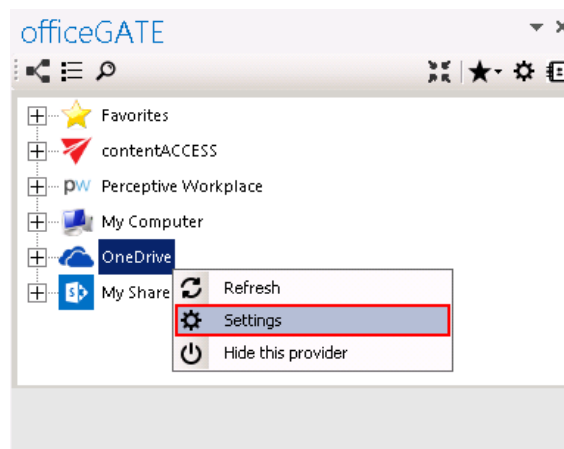
officeGATE is a brilliant tool that integrates OneDrive into your MS Outlook mailbox and ensures a simple and quick access to the documents stored in the OneDrive folders. The OneDrive provider (in the officeGATE pane) connects the user both to his personal and business account using 2 subnodes:

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

- **Business** – this node connects you with the online OneDrive for business system using your company account (e.g. john.doe@gmail.com)
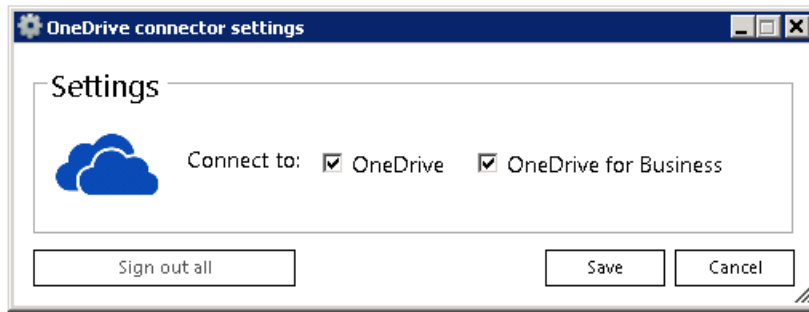
If you have installed OneDrive on your computer, the files will be available locally under the **My Computer** node, too.

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".

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In the next step a Microsoft authentication window will pop up asking you to sign in. Enter your credentials and click "Sign in":
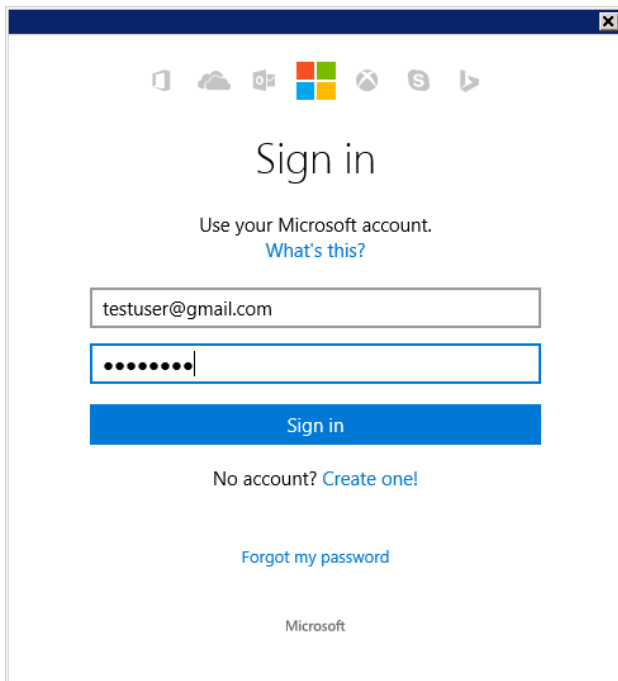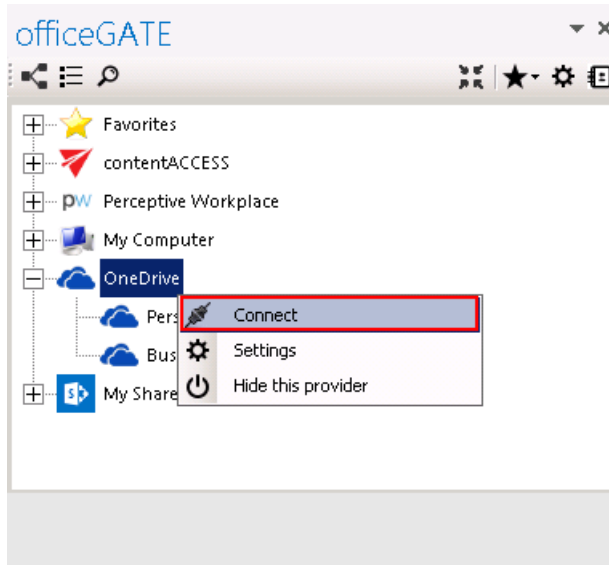

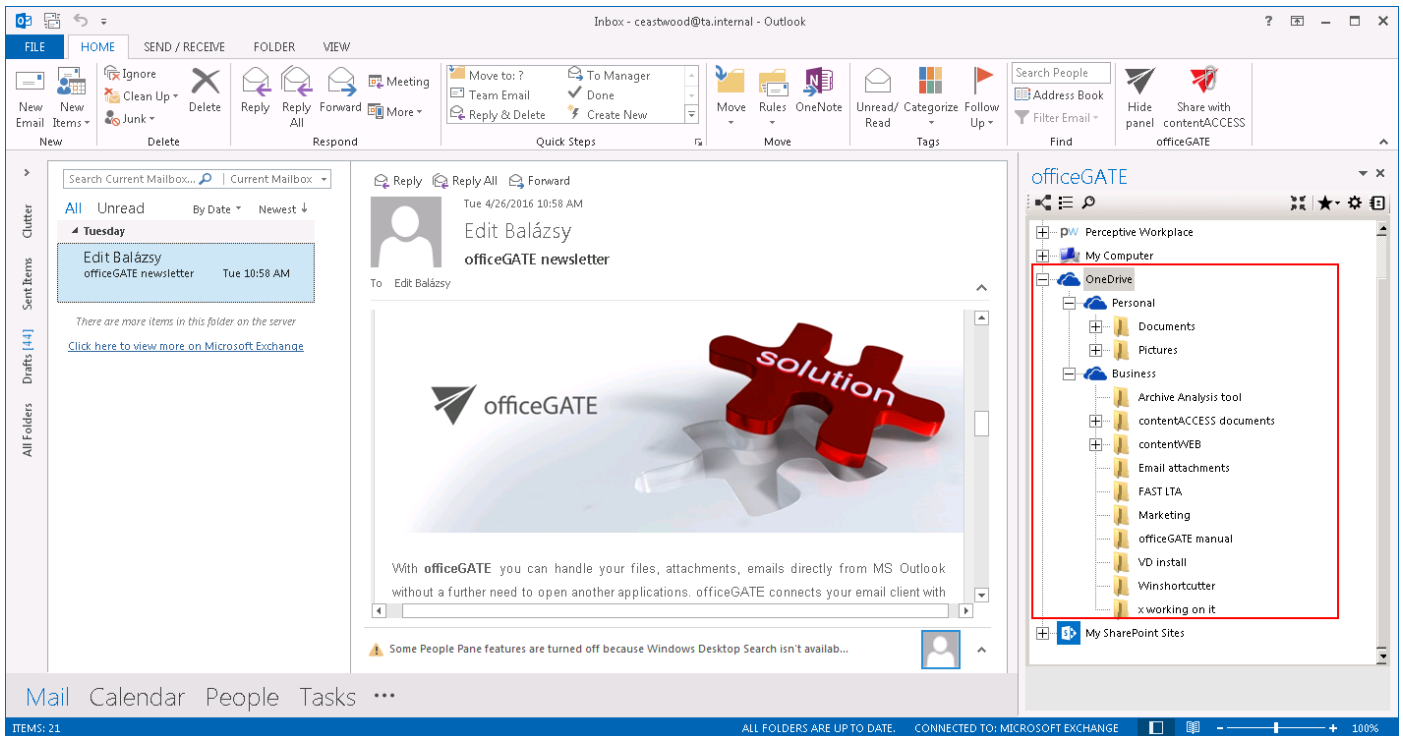Signing into **OneDrive** with personal account
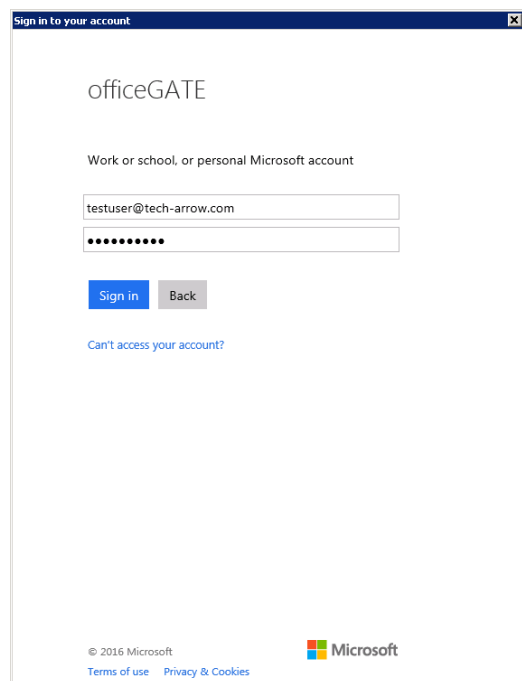
Signing into **OneDrive for business** using business account

Further locate your OneDrive node in the pane and click "Connect" in its context menu:

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Wait until the Personal and Business folders are loaded and 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.

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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 cog mark (⚙) in the officeGATE pane. The **officeGATE settings** dialog will open. Here switch to the **General settings** tab. The following functions can be configured here:
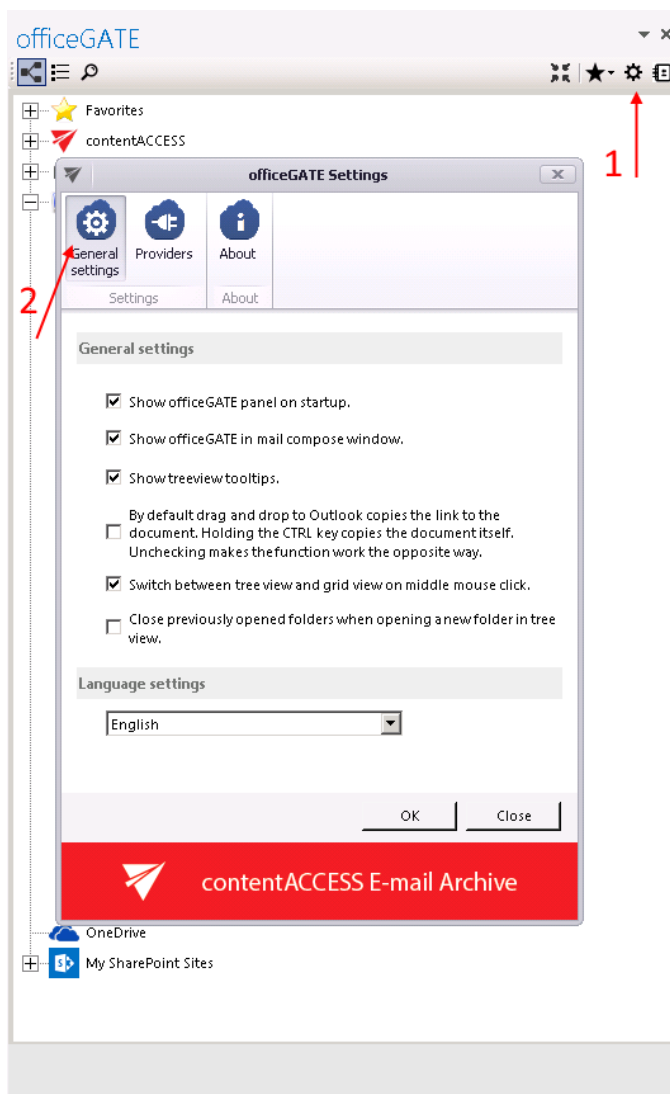
1) **Show officeGATE panel on startup**: If this option is selected, the officeGATE pane will be displayed automatically when opening your Outlook. Otherwise the officeGATE pane will be hidden and you need to click on the officeGATE button ( ) to show it. (For more information see the section [Displaying officeGATE in Outlook](#).)

2) **Show officeGATE in email compose window**: If this option is selected, the officeGATE pane will be displayed automatically in any newly opened email message.

3) **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.

4) By default Drag&Drop copies to an email message only the link to the selected document. Holding the CTRL key copies the

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documents itself, if this (4ᵗʰ) option on the **General settings** page is turned on. Unchecking makes the function work the opposite way.

5) 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.

6) 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.

7) **Language settings** are also available in section **General settings.** The user has the choice to select the language of the application here. It is possible to select either English or German language from the dropdown list.

Note: Language selection is also available by installing officeGATE.

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License key activation

In the **officeGATE Settings** dialog click on ![info icon] **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:

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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.

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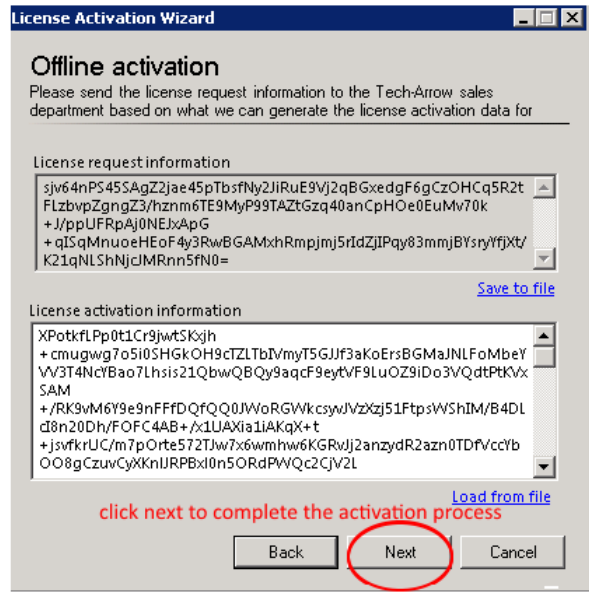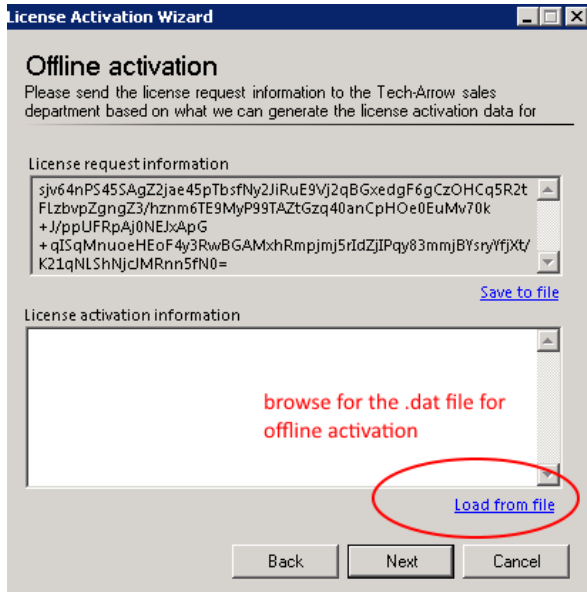
Handling with documents using officeGATE

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.

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Setting favorites

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

Note: *The tooltips of Favorites show the parent folder, which makes the navigation even easier.*
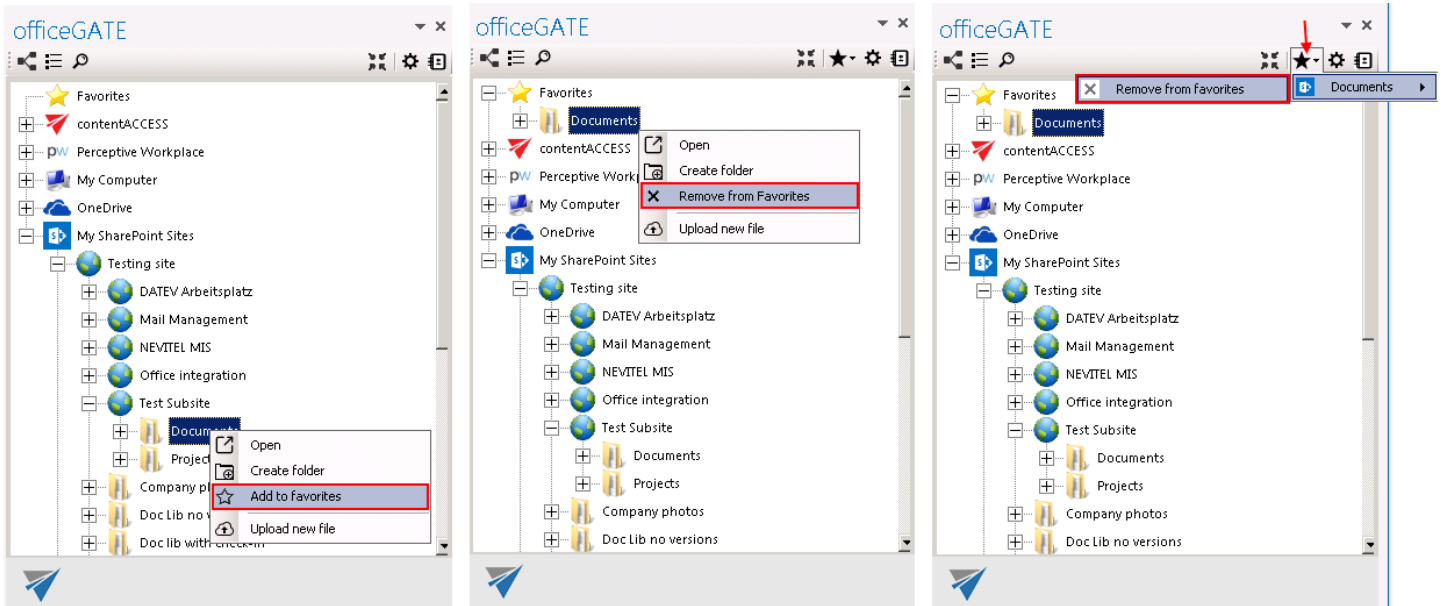
To add a folder, library or contentACCESS plugin between **Favorites,** click on it in the pane, open its context menu and select **Add to favorites** from the list. The selected folder/library will be shifted under the **Favorites** node.

If you move with the cursor over the folder/library in the **Favorites**, the tooltip will open. The tooltip text shows the path of the selected folder/library.
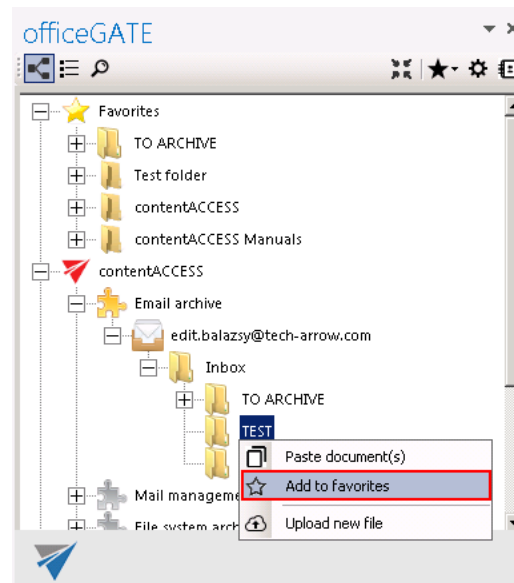
You can remove the selected locations if you do not want them to be included between favorites any more. There are multiple options how to remove a favorite location from the list:

1) Open the **Favorites** node (yellow star) from the pane, select your favorite, open it's context menu and click on **Remove from favorites** option (refer to the second screenshot below).

2) Click on the black star in the officeGATE's status pane, select your favorite, and click on **Remove from favorites** option (refer to the third screenshot below).

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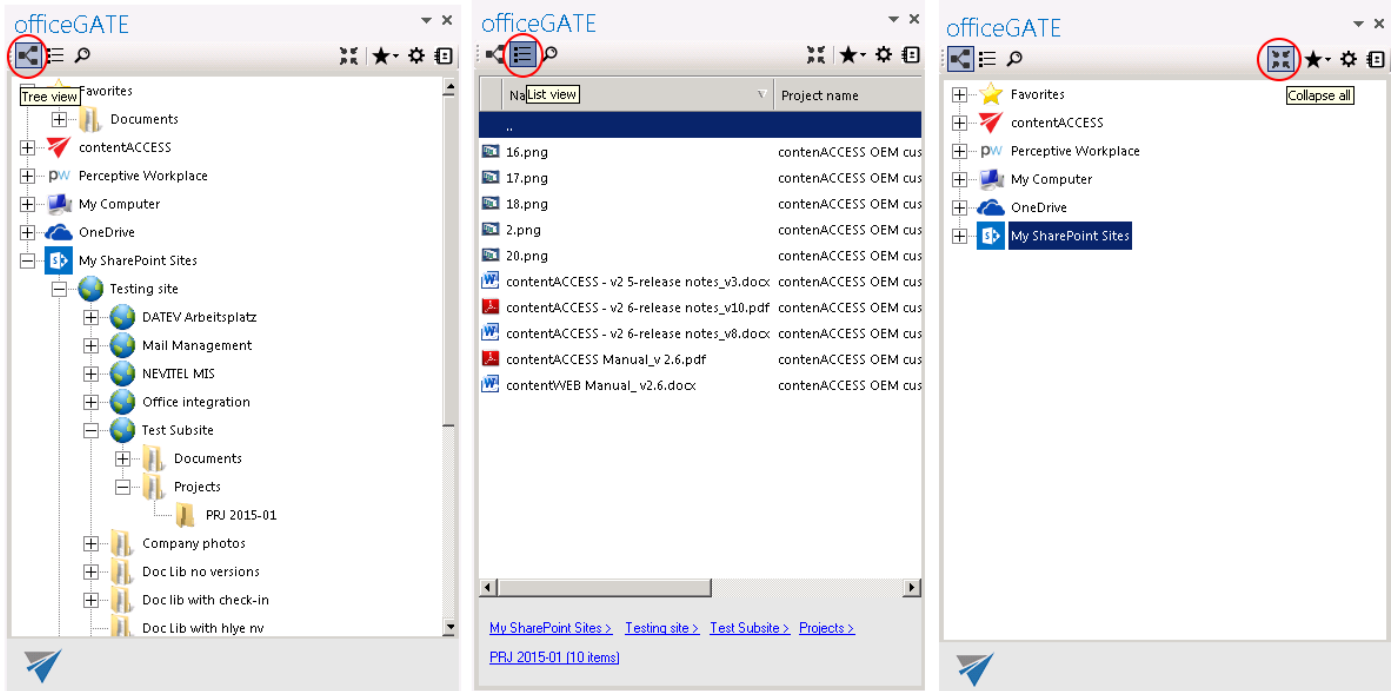Adding "Documents" folder between Favorites | Removing "Documents" from the Favorites list | Removing "Documents" from the Favorites list

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).

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Screenshot A: Tree view   Screenshot B: List view   Screenshot C: Collapse all

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

The user can add the selected child to the list of favorites, rename, delete, open selected folders, create new subfolders from the context menu directly or upload new files into it. The first table of chapter 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.

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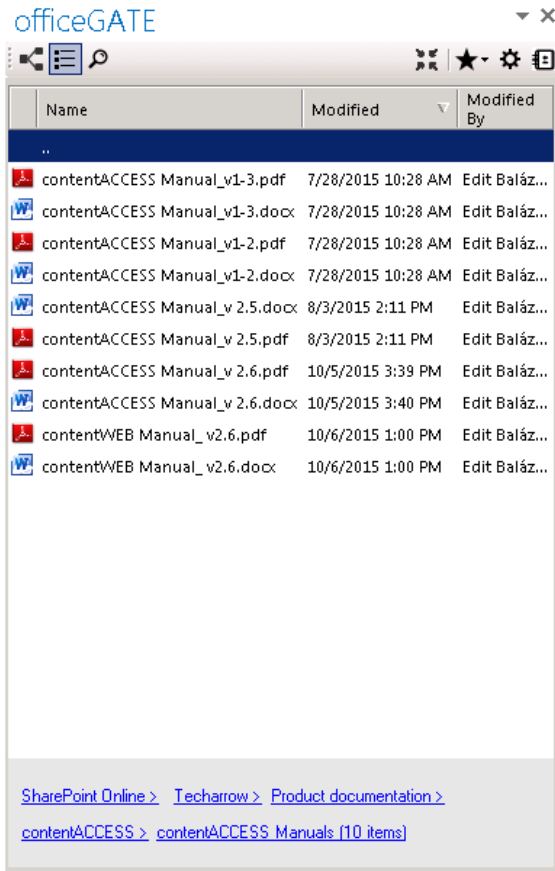
With the ⚃ **Collapse all** option you can collapse the nodes that have been previously opened in the Tree view mode (Screenshot C above).

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 double-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.
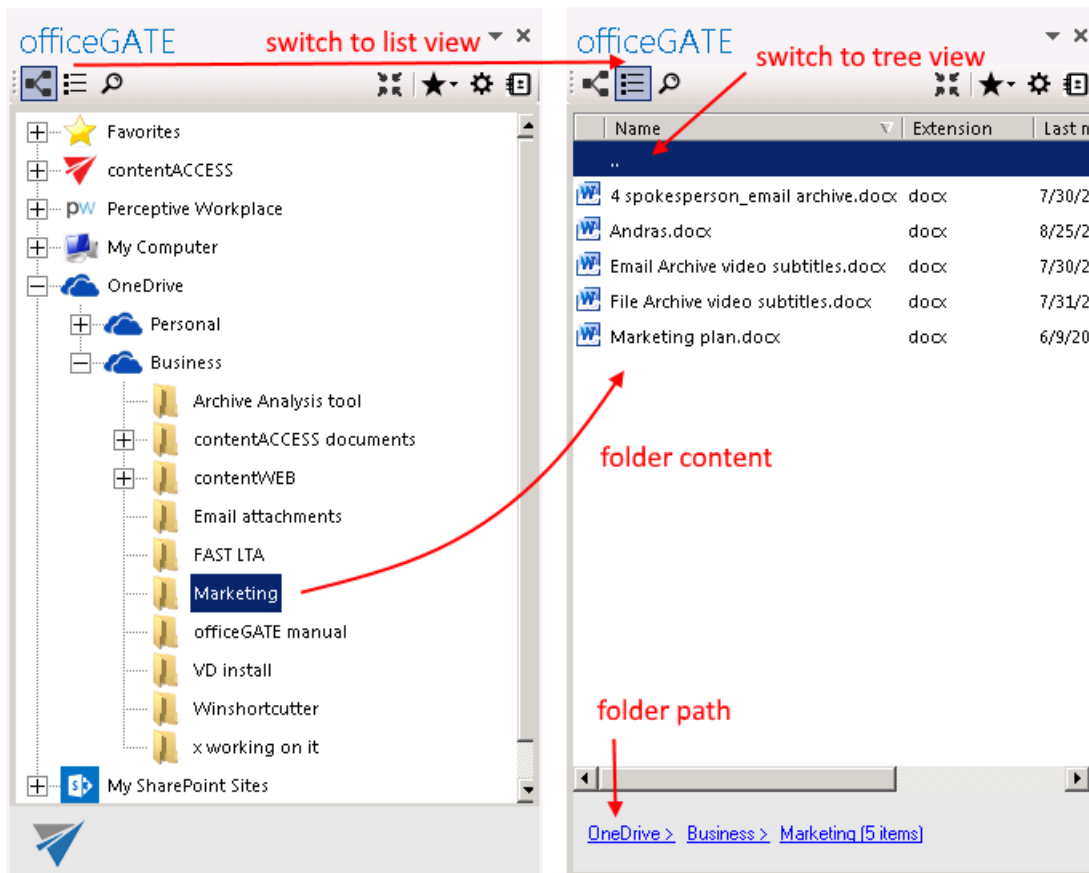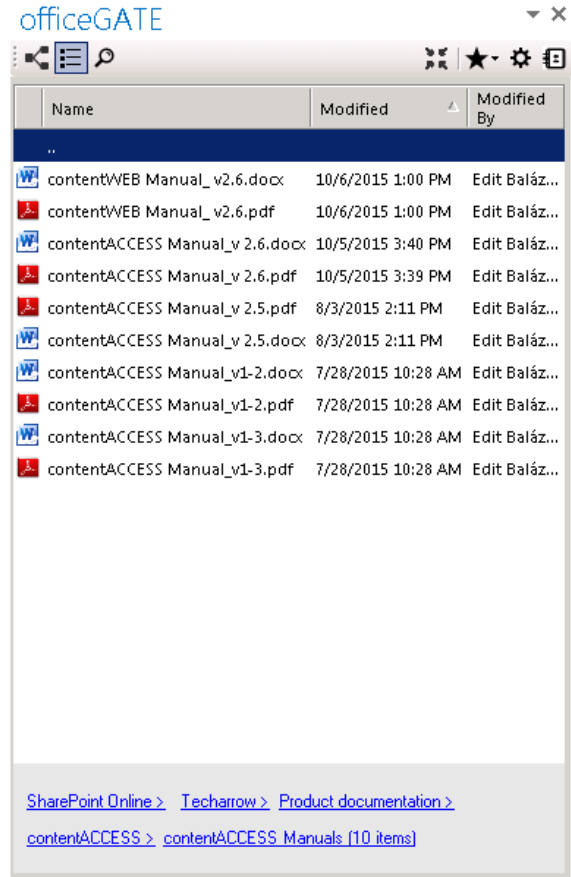

Sorting in List view

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 screenshot below a SharePoint folder is chosen, where the files can be sorted by 3 column headers (sorting criteria), namely: **Name, Modified** and **Modified by**. On the second picture the files are sorted by the date when they were last modified.

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

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

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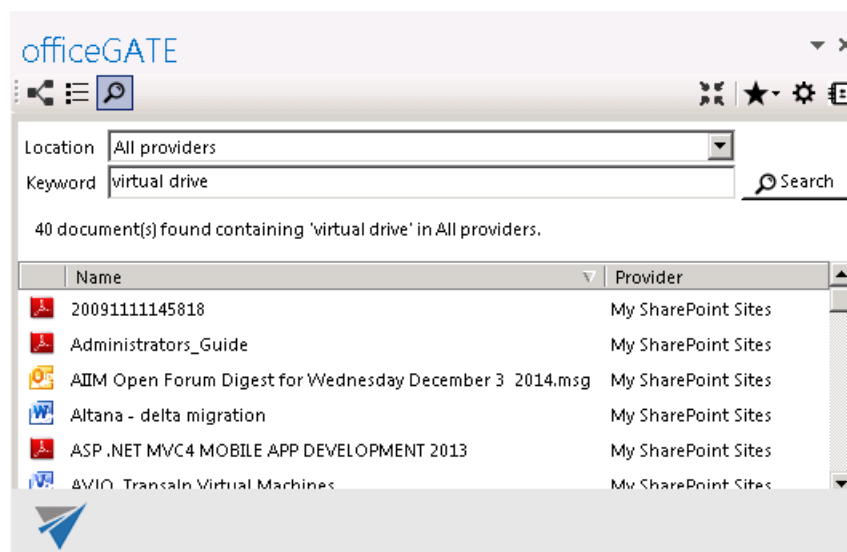
Searching in officeGATE

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.
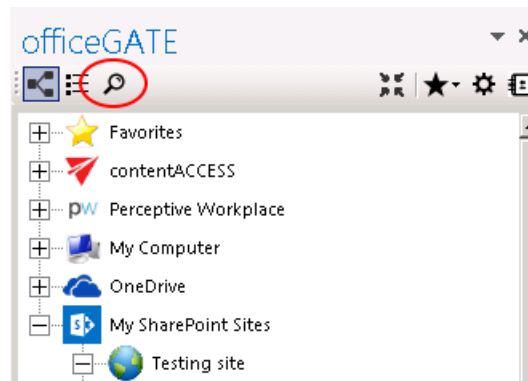

It is possible to search

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).


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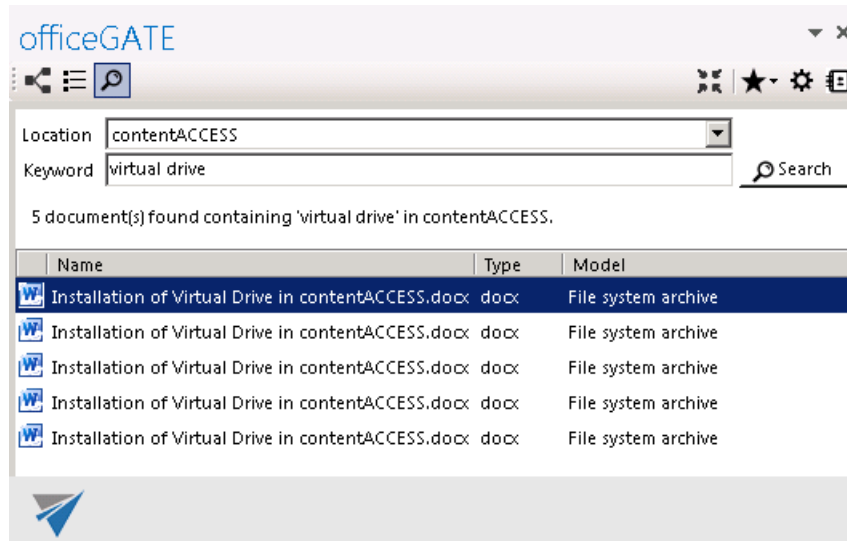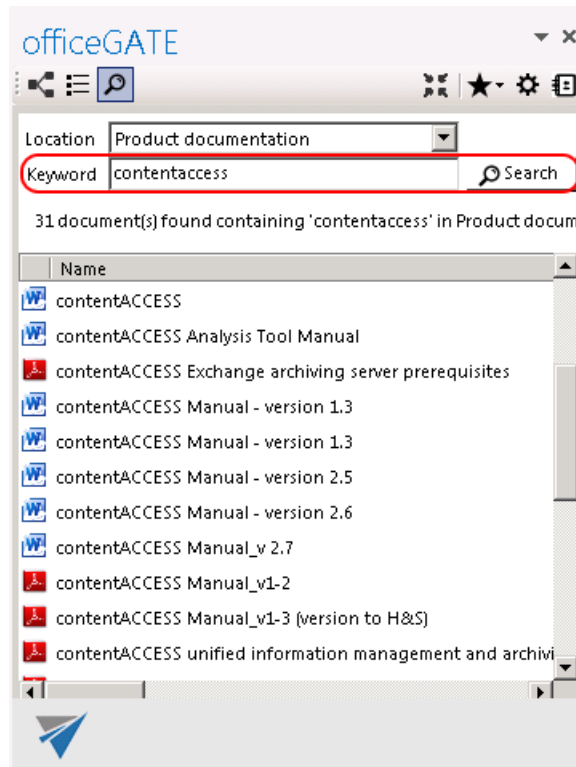

c) **In the selected node's content (node=folder or library)** → In this case locate the desired folder/library in the tree view and click on it. Then click on the magnifier mark in the pane to open the search page. The **Location** will be already preselected. Specify the keyword and click "Search".

The following use case will demonstrate how to search for contentACCESS guides in the "Product documentation" SharePoint library. Select the "Product documentation" library under the SharePoint node, and click on the magnifier mark (🔍):
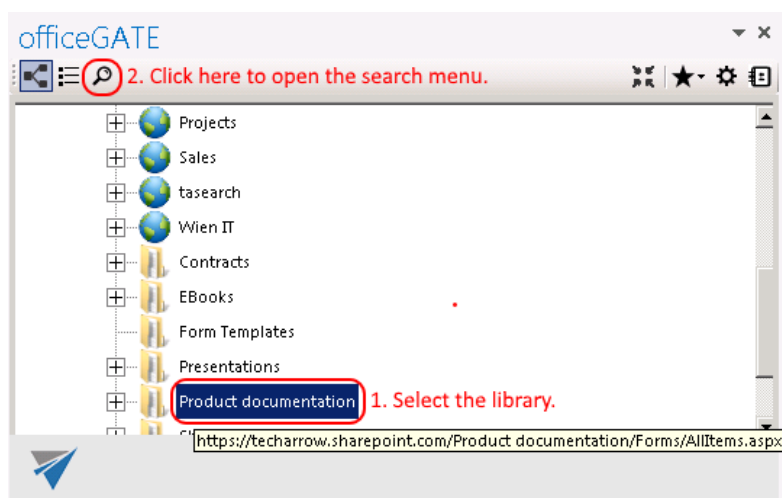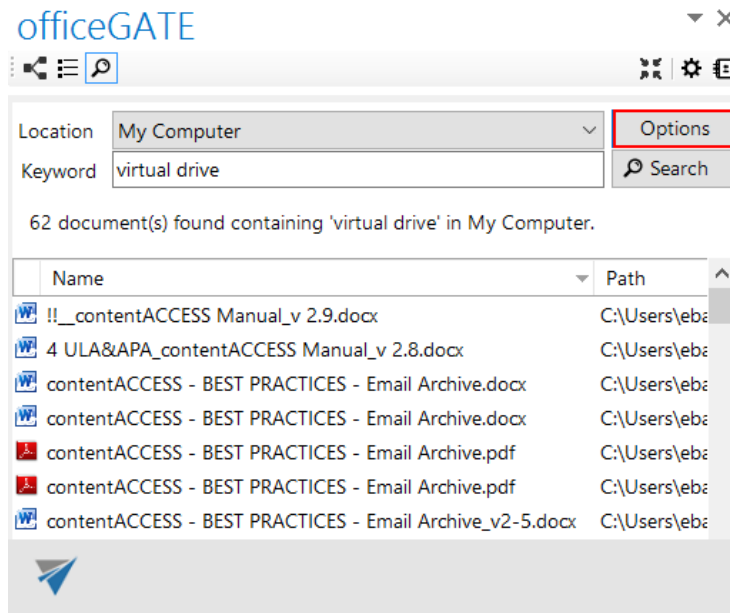

Specify the keyword that you are looking for (in our use case "contentaccess") and click on **Search**:

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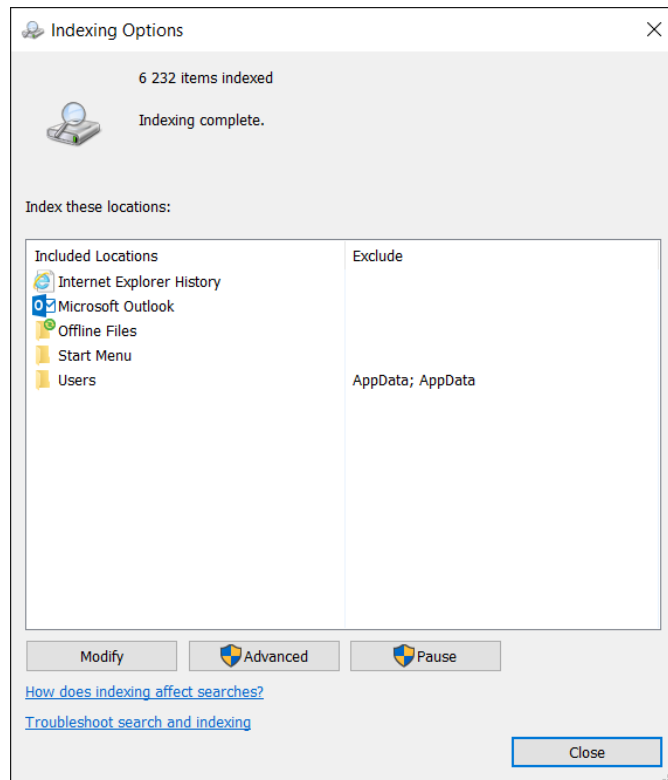
31 documents have been found, of which title or text contains phrase "contentaccess".

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.

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

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The following operations are available from the context menu of the searched items (from the search page):
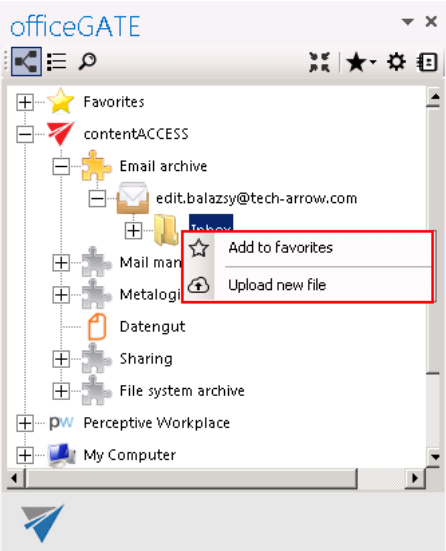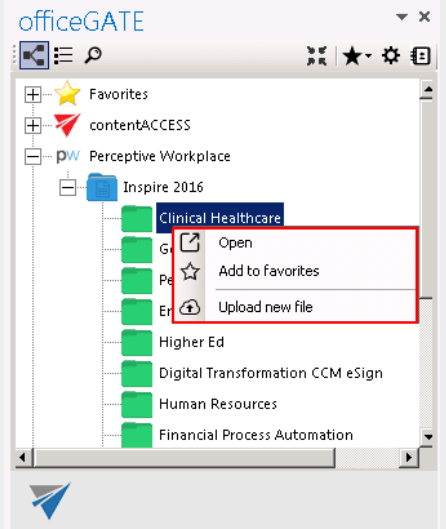
- Send as attachment*

- Send as link*

- Send as ZIP file*

- Save document(s) locally*

- Copy document(s) *

- Open*

- **Open 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.
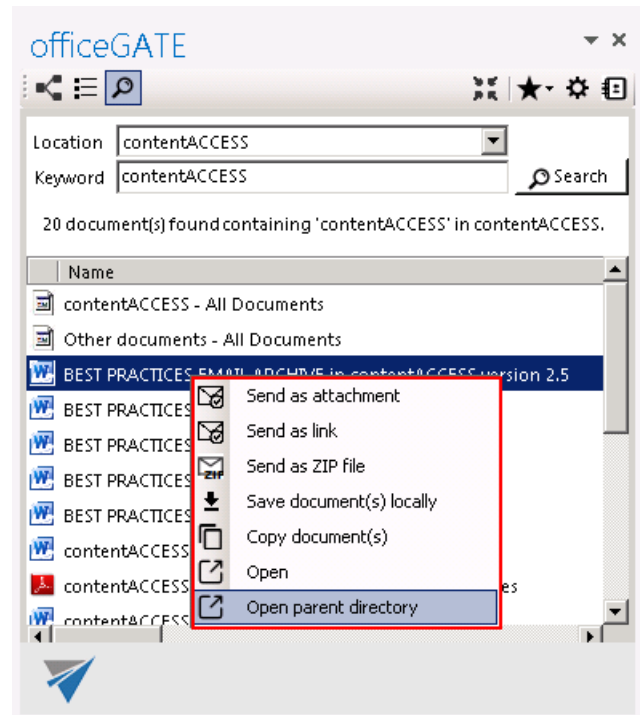
*These features are described in details in chapter <u>Working with nodes and files using the context menu</u> of this guide.

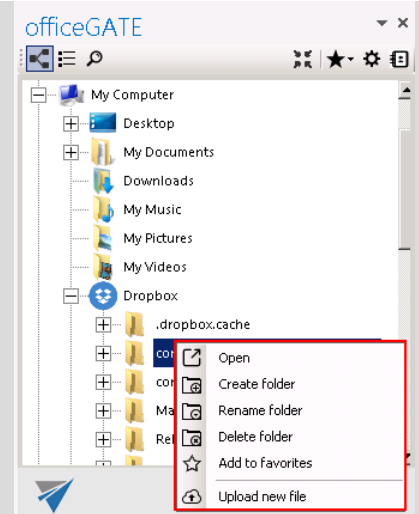## Working with nodes and files using the context menu

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

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Providers	Operations on folders/libraries using their context menu	
contentACCESS	✓ Add to favorites ✓ Upload new file	
Perceptive Workplace	✓ Open ✓ Add to favorites ✓ Upload new file	

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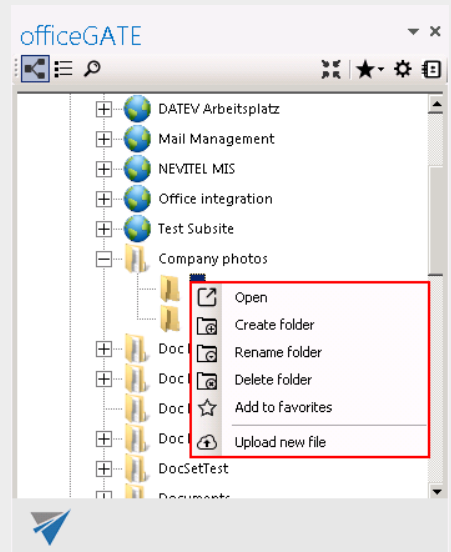|		
My Computer (including local Dropbox and OneDrive folders)	✓ Open ✓ Create folder ✓ Rename folder ✓ Delete folder ✓ Add to favorites ✓ Upload new file	
SharePoint	**library:** ✓ Open ✓ Create folder ✓ Add to favorites ✓ Upload new file **folder:** ✓ Open ✓ Create folder ✓ Rename folder ✓ Delete folder ✓ Add to favorites ✓ Upload new file	

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| OneDrive and OneDrive for business | ✓ Open
✓ Add to favorites
✓ Upload new file | |

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 ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Upload new file	

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Perceptive Workplace	✓ Open ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Upload new file	
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 ✓ Upload new file	
Sharepoint	✓ Open ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Delete document ✓ Rename document ✓ Create folder ✓ Upload new file	

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|		
OneDrive and OneDrive for business	✓ Open ✓ Send as attachment ✓ Send as link ✓ Send as ZIP file ✓ Save document(s) locally ✓ Copy document(s) ✓ Upload new file	
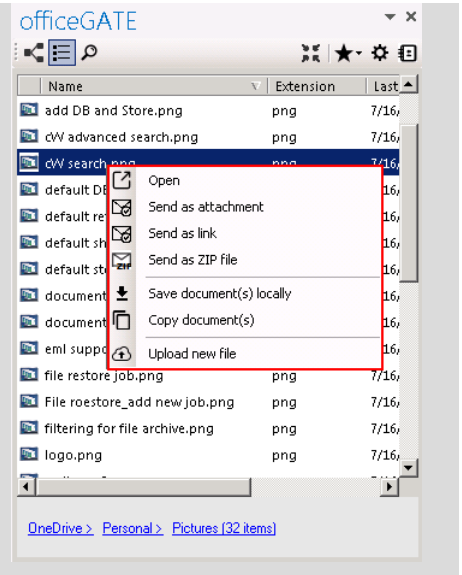
For instructions on everyday use cases of working with files in officeGATE, read the below described topics. Select your provider from the officeGATE pane and connect to it if it's not connected automatically. Then switch to list view, locate the file(s) that you want to work with, and open its context menu (with a right click on it).

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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, do the necessary corrections in the document and save it. You can do the necessary corrections online, without downloading and uploading the file to the folder or library again.
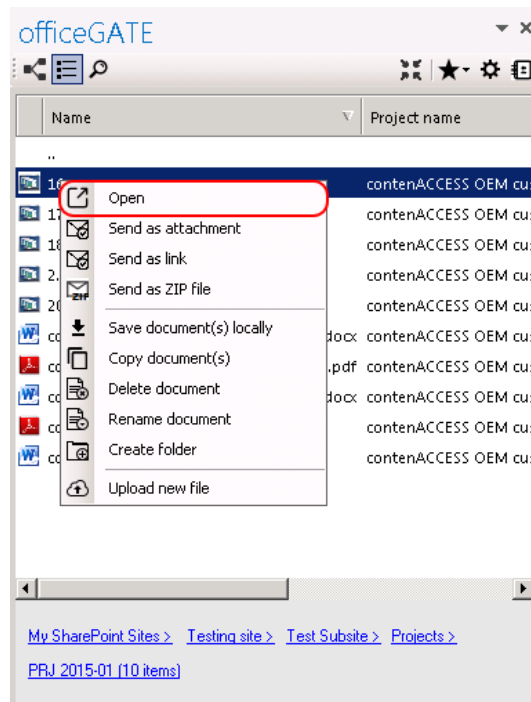

Note: The file is downloaded **locally** into a temporary folder if it is **double clicked**. If you open a locally downloaded file and edit it, the changes will not be synchronized back to the source (online) location. This is quite important if you have online systems (e.g. SharePoint, Perceptive Workplace). 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 attachments/links to the file

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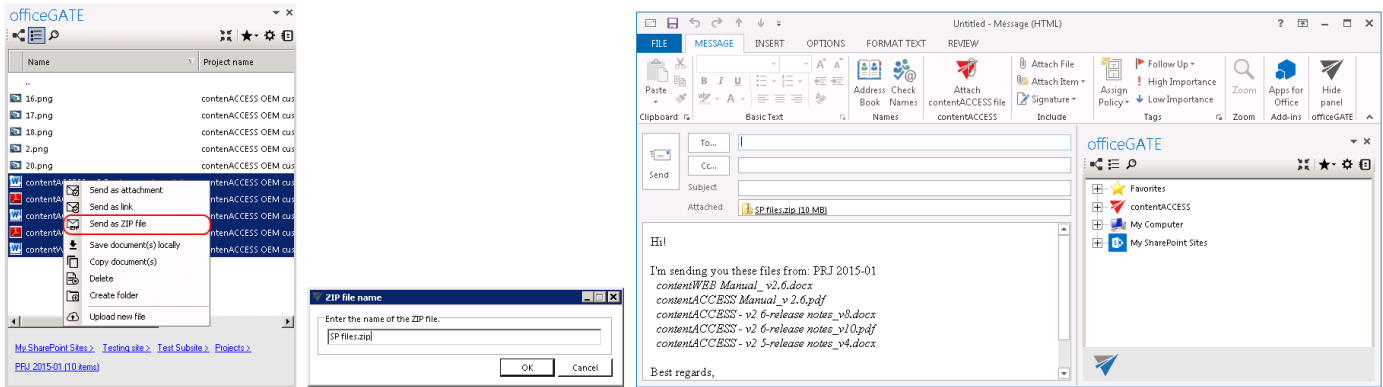
You can decide if you want to send the file as an attachment or you prefer to send a link to the file instead. If you want to send the file itself right click on the file and choose ✉ **Send as attachment** from its context menu. If you want to send the link to a file only choose option ✉ **Send as link**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

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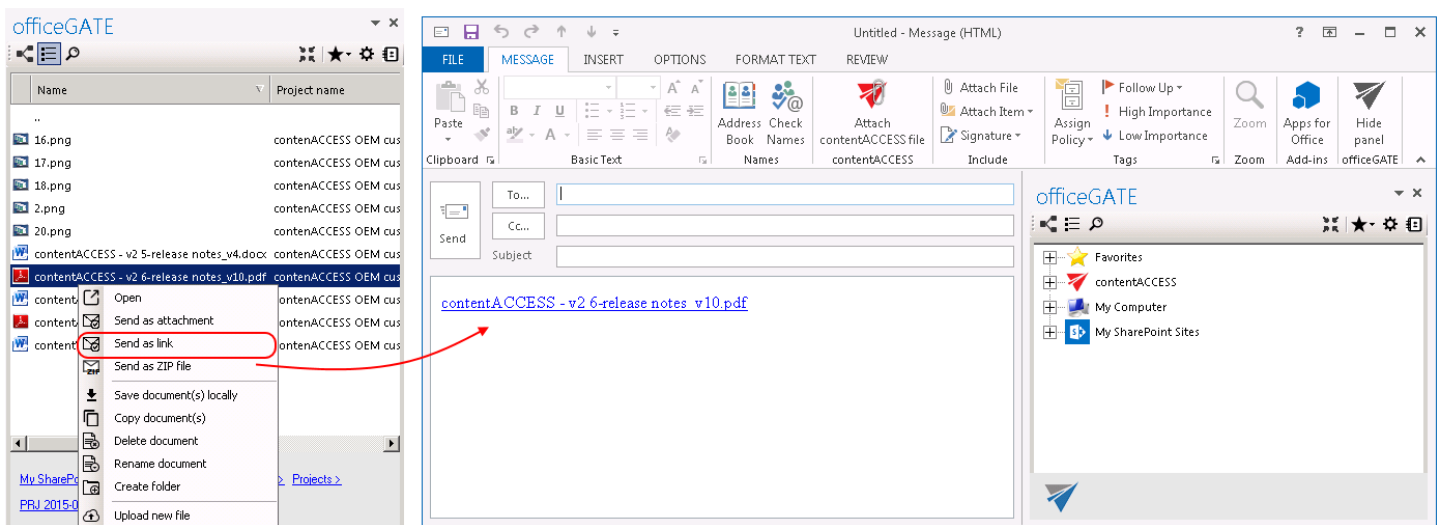
Sending ZIP files

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

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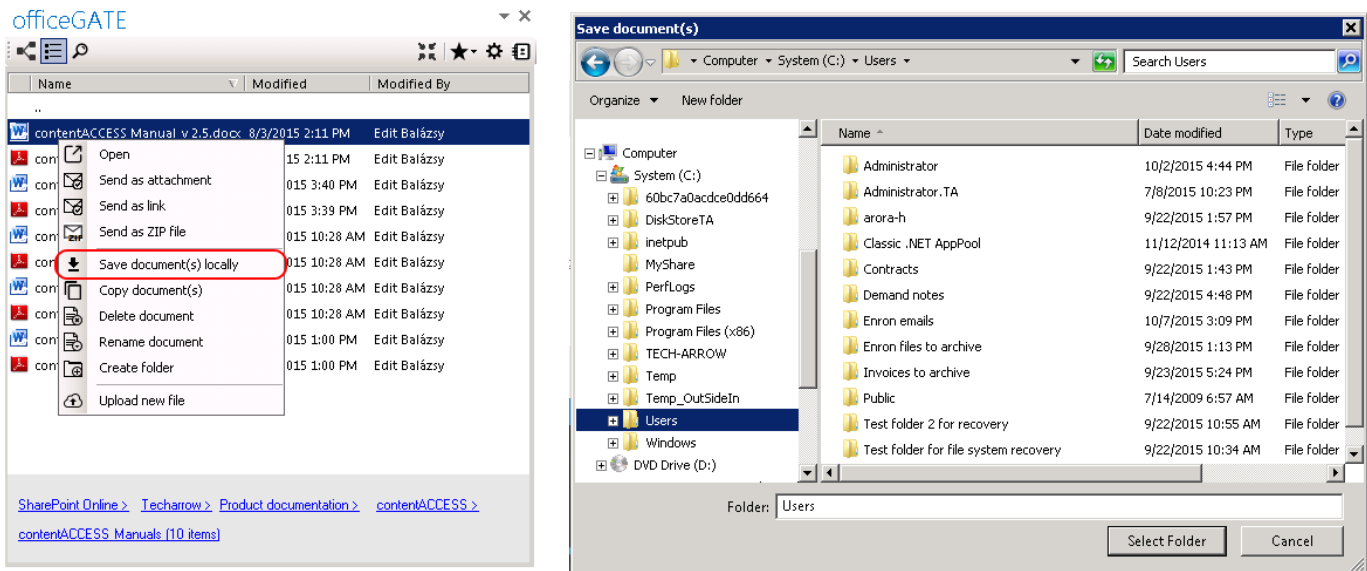3. Send the files to the addressee.

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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)

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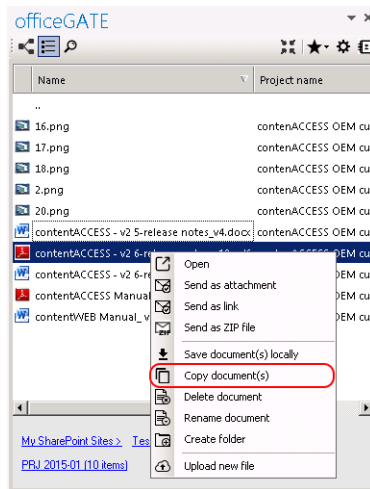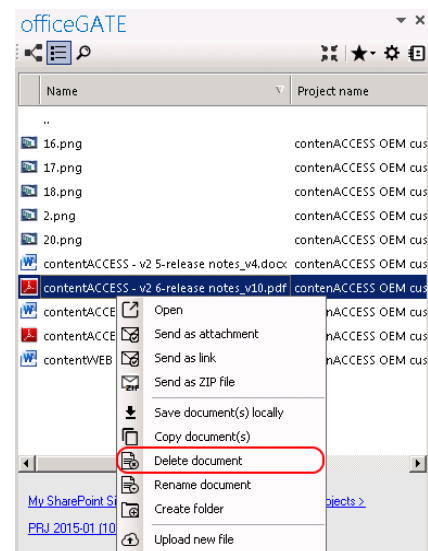

Screenshot A: Copy document(s) from a source location
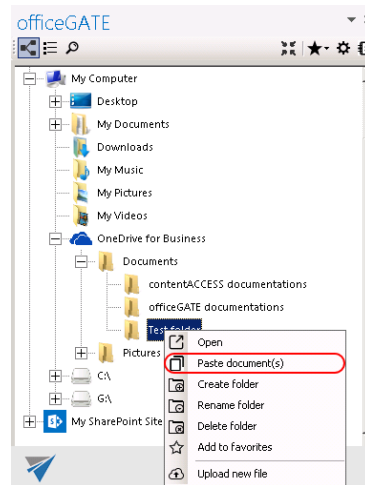
Screenshot B: Paste document(s) to a target location

Deleting document(s)

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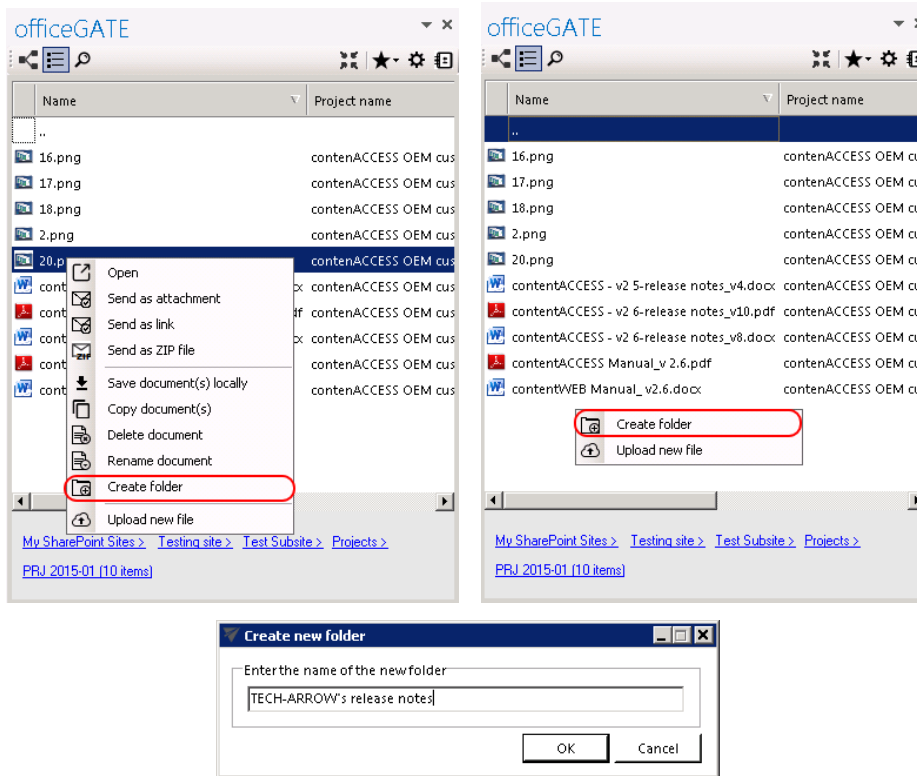

Renaming document(s)

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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**.
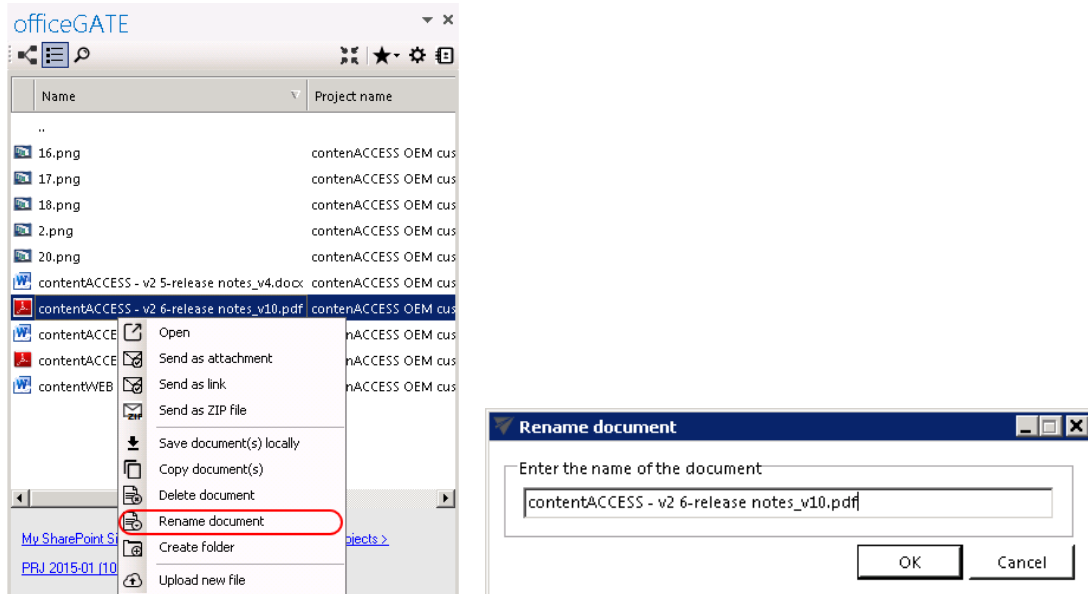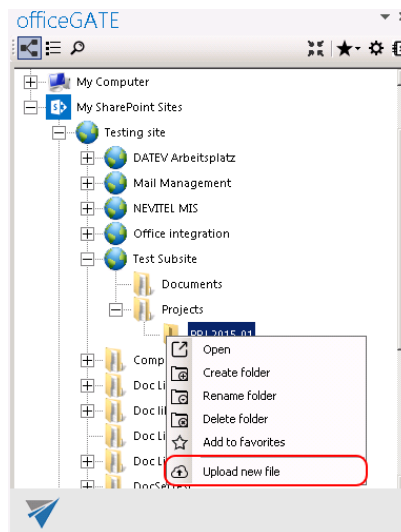

Creating folder(s)

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

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Uploading new file(s)

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

Uploading a file from the tree view

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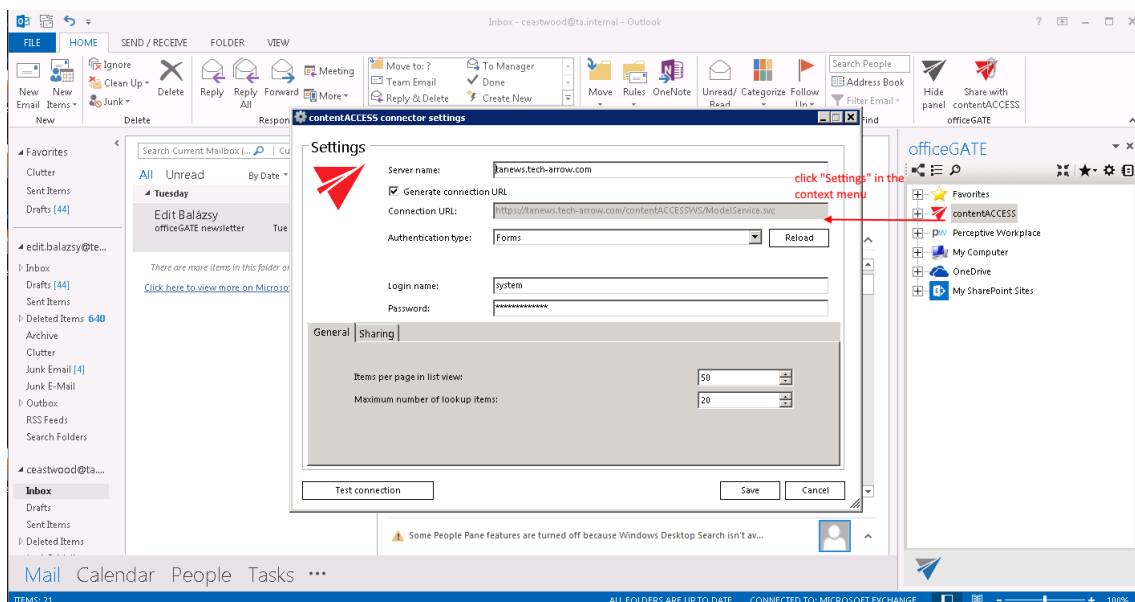
Sharing files directly from MS Outlook

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

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

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

1. **Configure a "Sharing" job in contentACCESS.** A "Sharing" job is available under Custom plugins (*Custom plugins → General → Jobs*) in the Central Administration interface of contentACCESS (more informatio [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.

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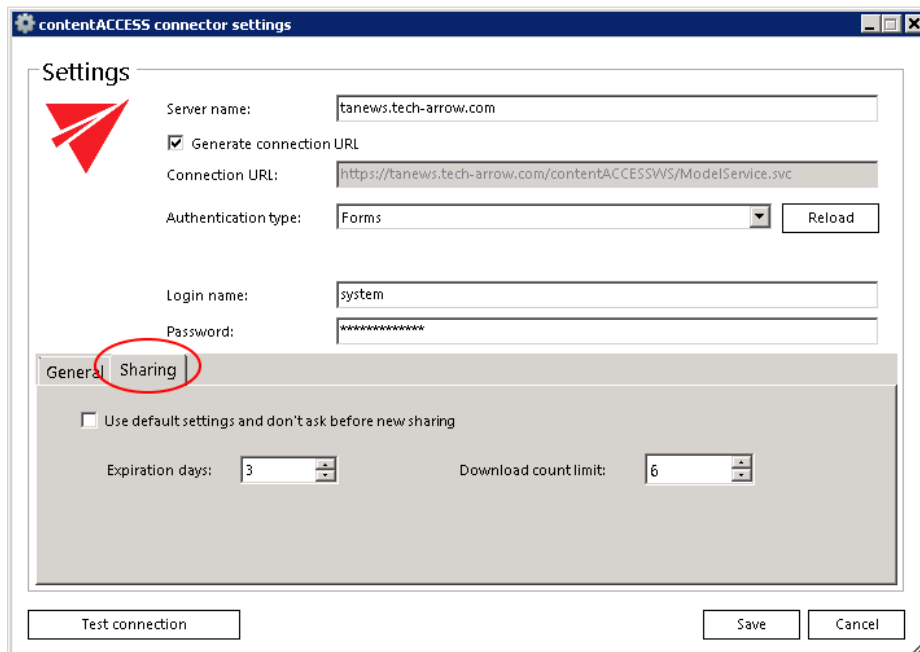
After successful connection expand the contentACCESS node. The sharing plugin is located under contentACCESS node in the officeGATE pane. The shared files will be saved into the folder located under this node.
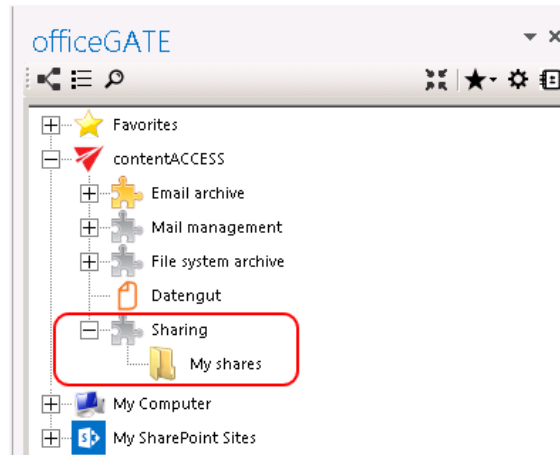
3. **Configure the default values** (default download count and expiration date) of sharing the files. This option is available in the **contentACCESS connector settings**, on the **Sharing** tab. The values can be changed directly from the upload dialog as well (described later).
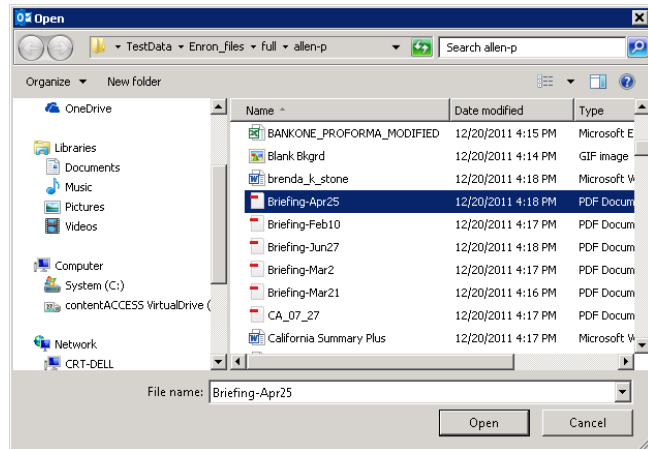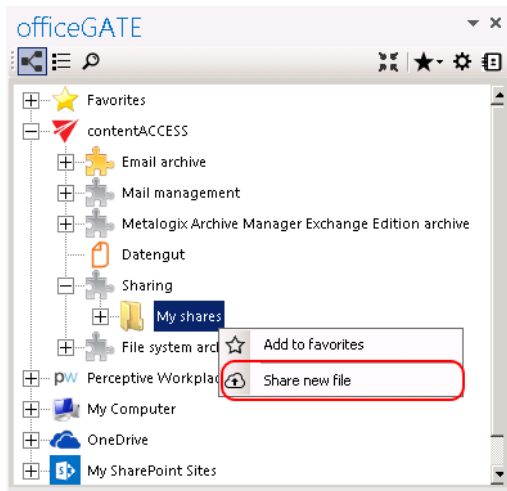
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4. If contentACCESS is connected with officeGATE, **you can share files**.There are 2 options how to do it:

a) **From the toolbar**: Click on the "Share with contentACCESS" button in the MS Outlook toolbar and locate the file that needs to be shared. Click "Open".

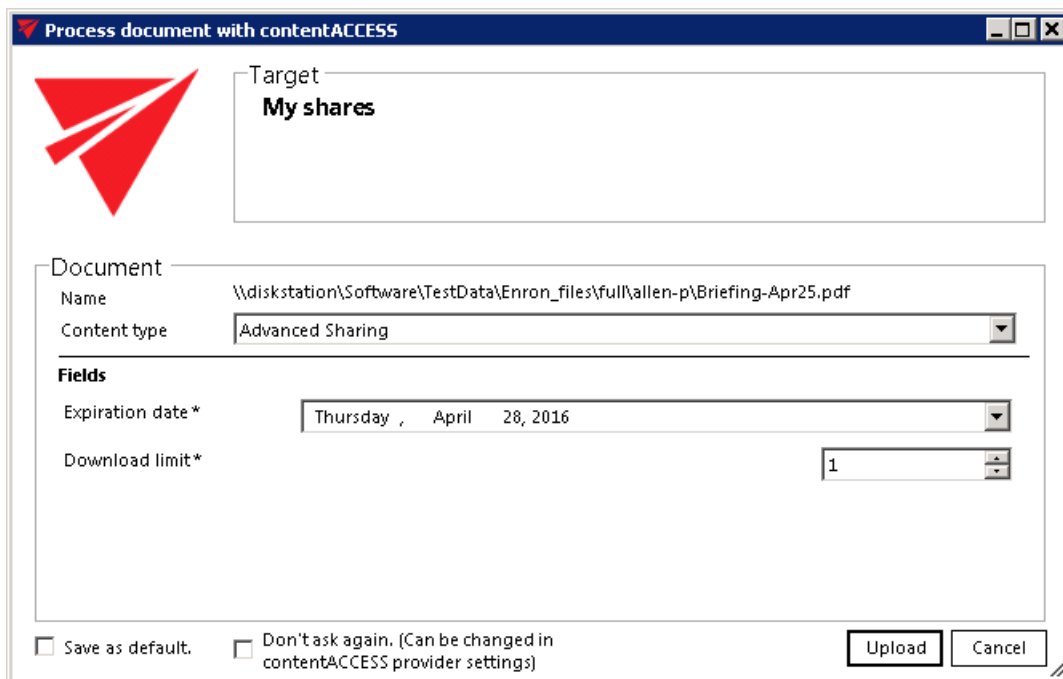The main advantage of this first option is, that the user does not have to locate the Sharing plugin in the pane.
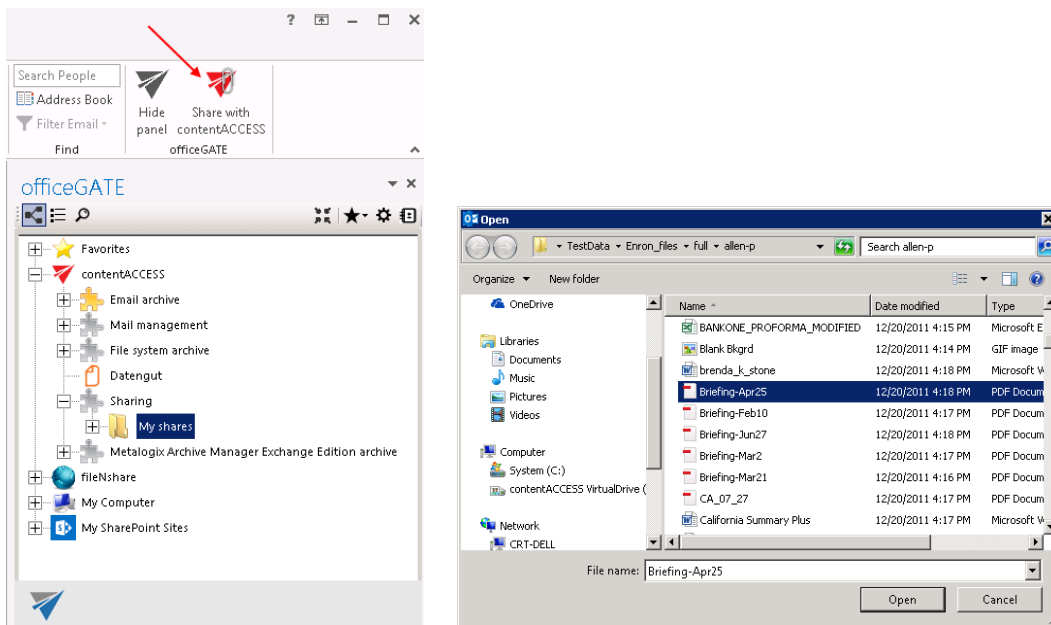
b) **From the share folder's context menu**: Open the context menu of the "My shares" folder under the "Sharing" plugin and select "Share new file" from the menu. Select the file that needs to be shared and click "Open".

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

- **Expiration date** – the time period of keeping the file in the **My shares** folder

- **Download limit** – the maximum number of downloads

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

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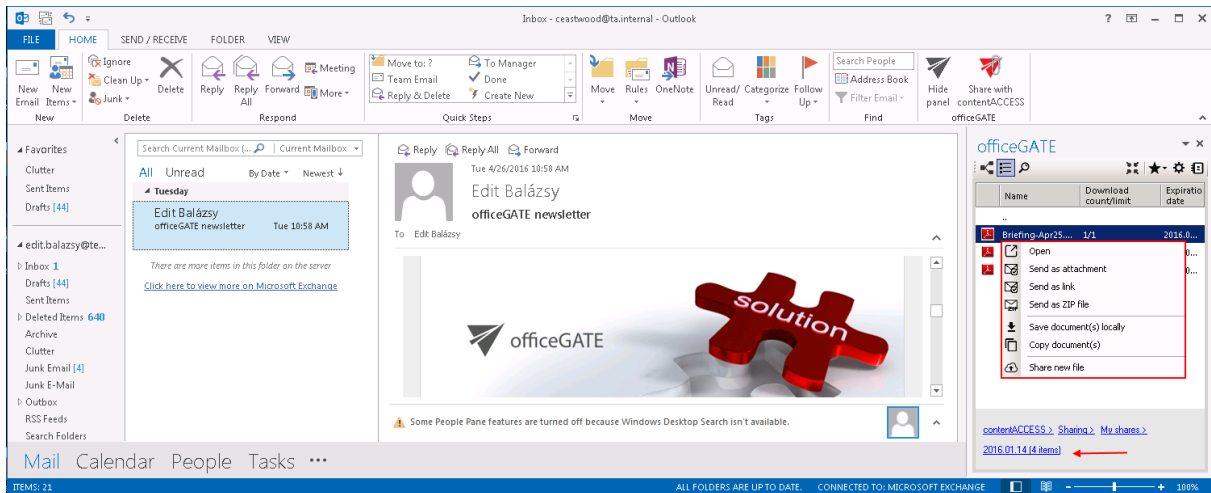
You may change the default expiration date and download count directly in this dialog, too. Simply enter the desired values into the text boxes, check the "Save as default" checkbox in the down left corner and upload the file. The newly specified values will be applied by each new upload. With checking the "Don't ask again" option the application will use the same default settings by each share, and won't ask the user again. These settings can be modofoed 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.
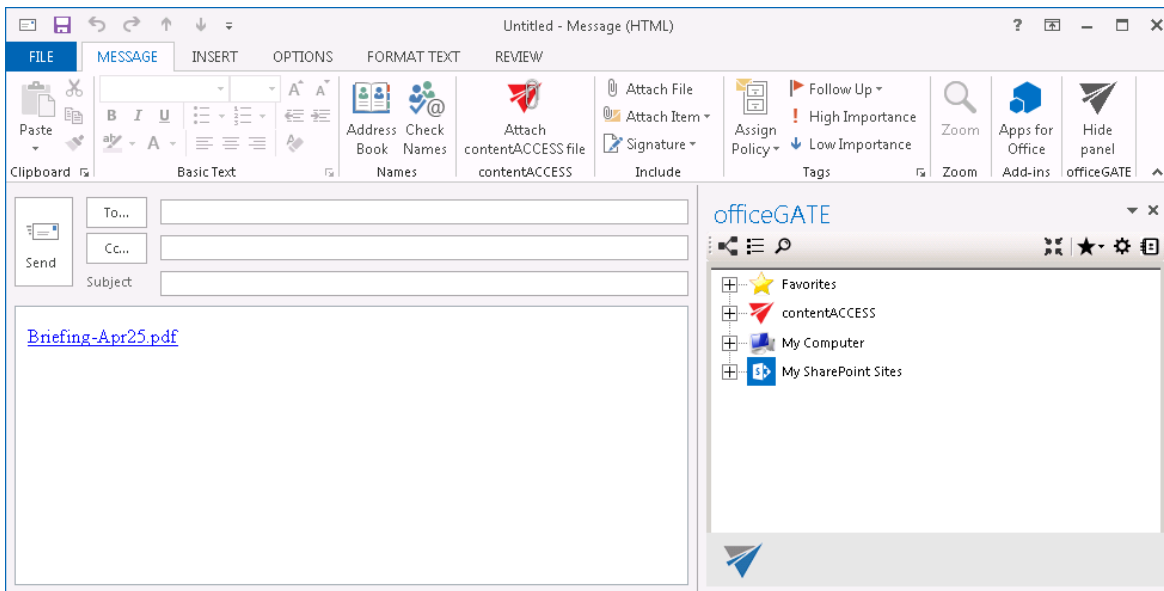
It is also possible to attach a contentACCESS file directly from the compose window. Click the **Attach contentACCESS file** button in the toolbar and opt for the file that should be attached.

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:

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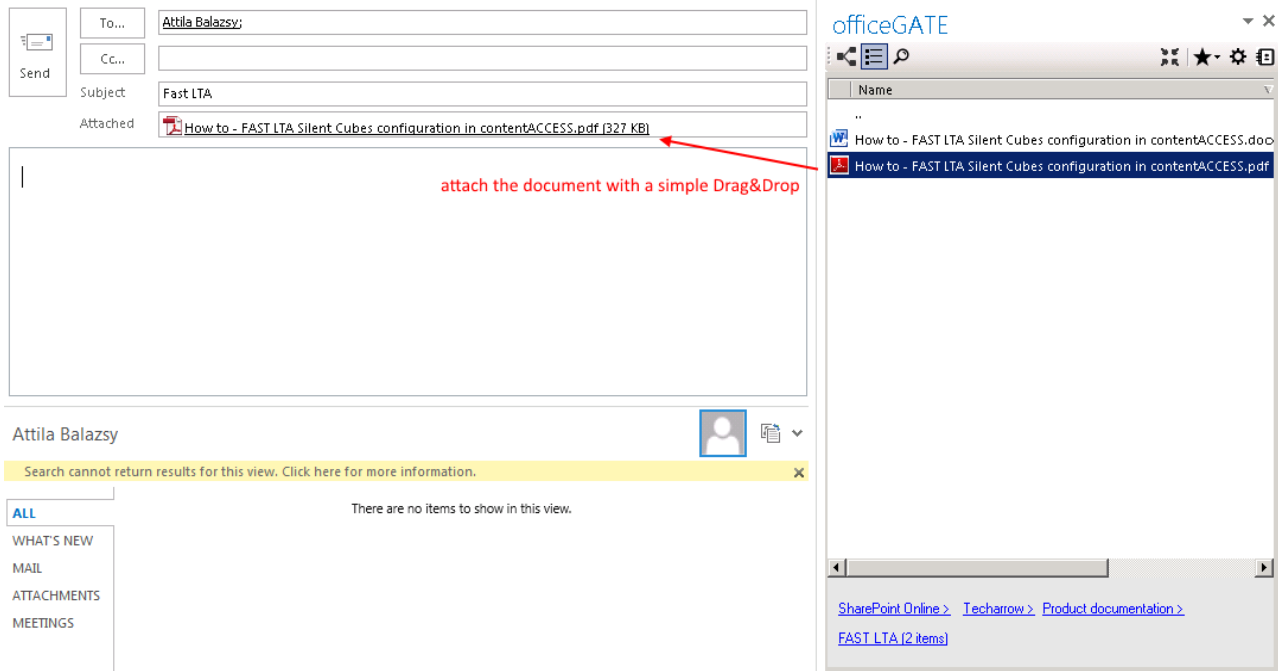
Drag&Drop actions

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.
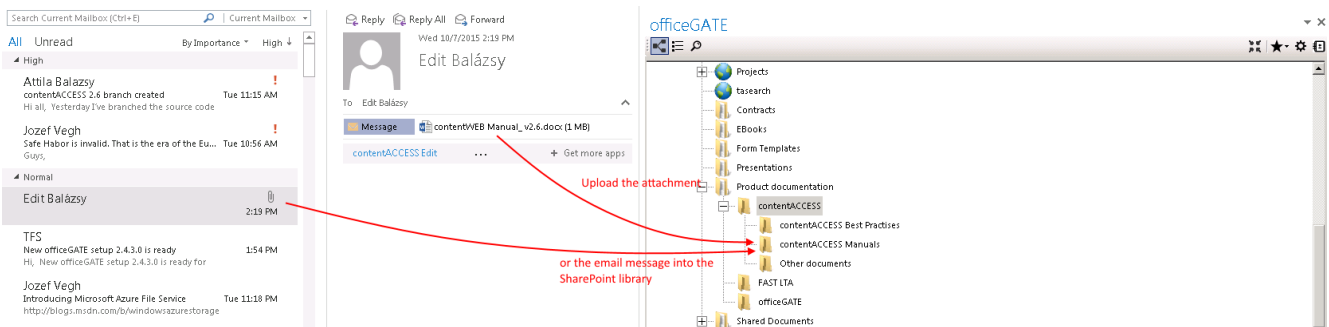
Attaching files to email message

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.

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## Uploading emails/attachments directly from the mailbox

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


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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), click "Upload" in the "Process document with contentACESS" window, and your message will be automatically archived.
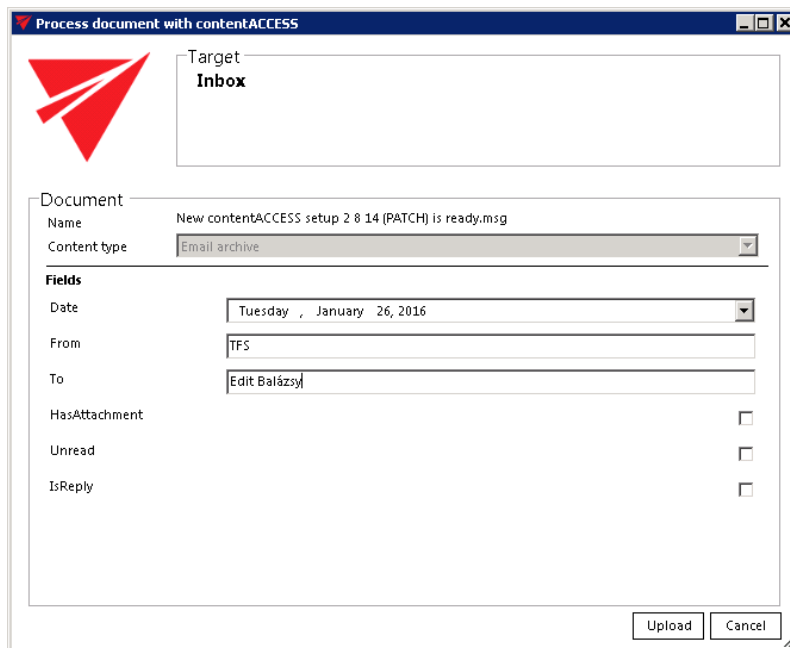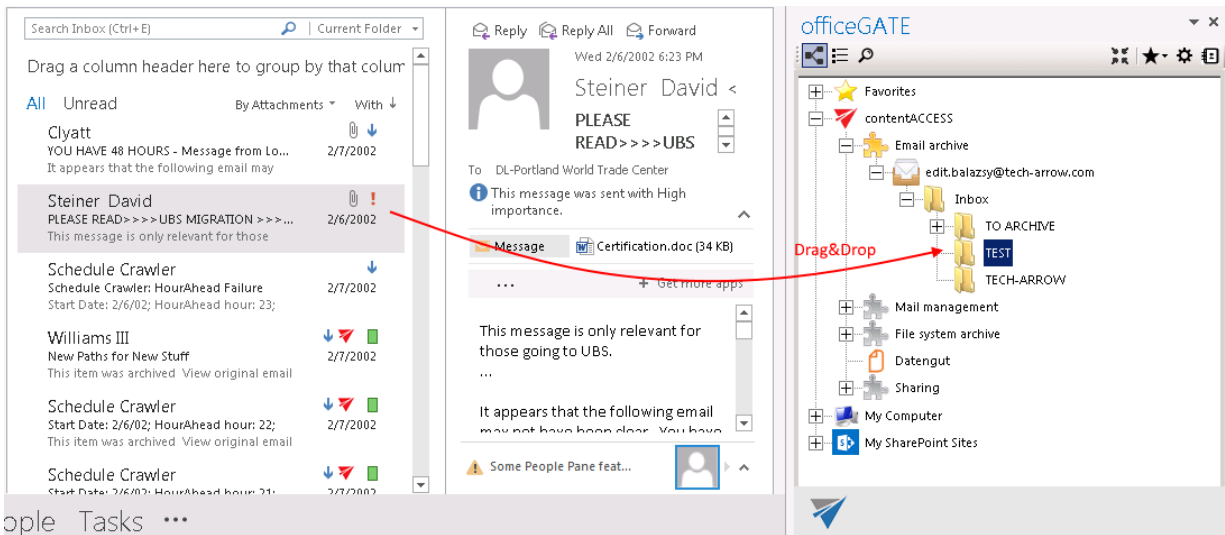
If the email has been already archived and the user drops this message to officeGATE, the application will warn him about that. The user will be asked, if he wants to archive the original email instead.

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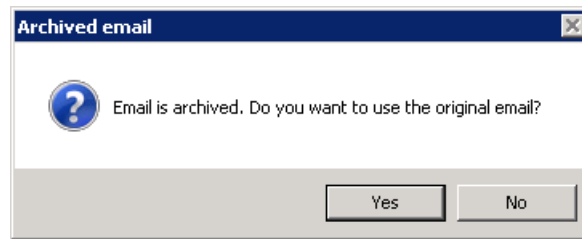
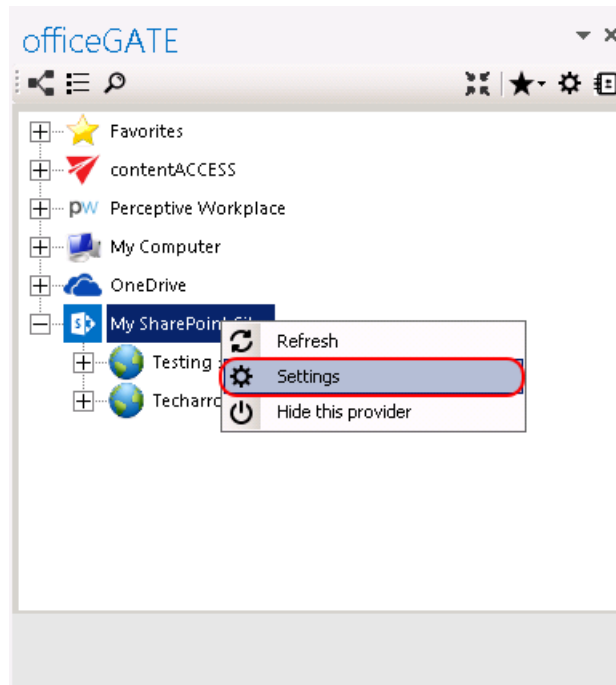## Content type selection and metadata fill in SharePoint

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

officeGATE enables for the user to use SharePoint's content type selection and metadata fill directly from Outlook by uploading a document. This feature allows to categorize your documents better and helps to save important information about a file for future use. Different content types have different fields (either optional or required).
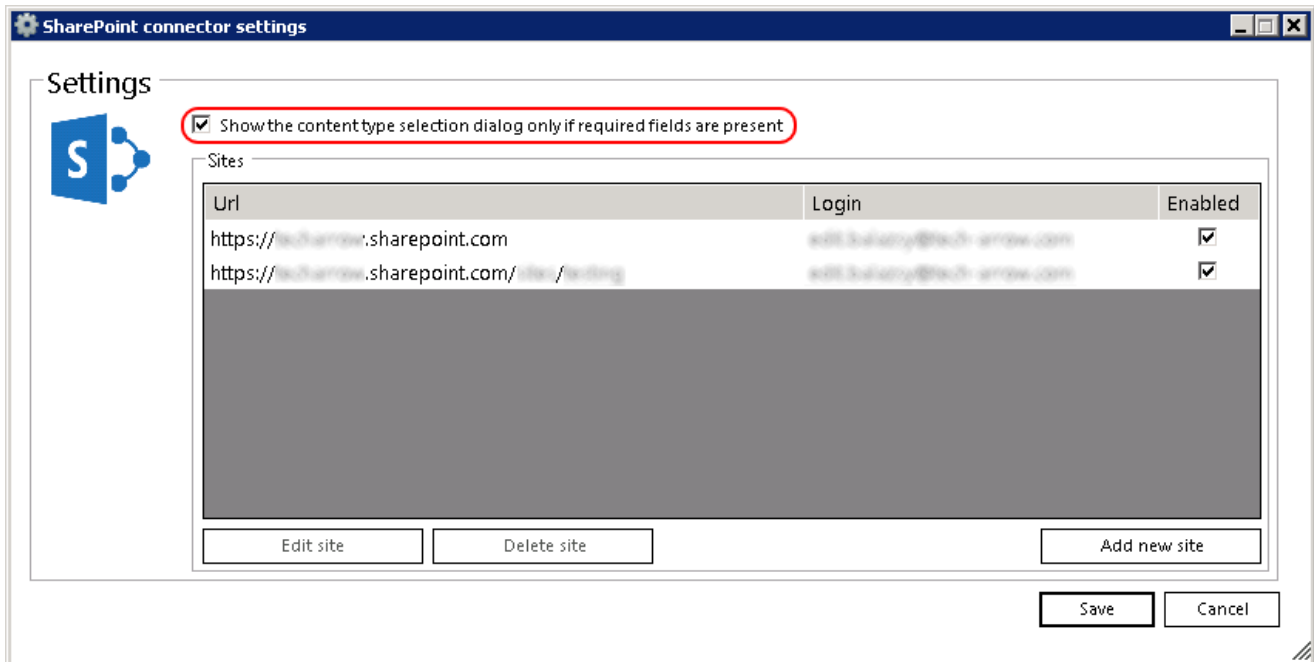
In officeGATE this option is configurable. The user may configure if he will specify these metadata in case that:

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

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

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The **SharePoint connector settings** dialog will open:

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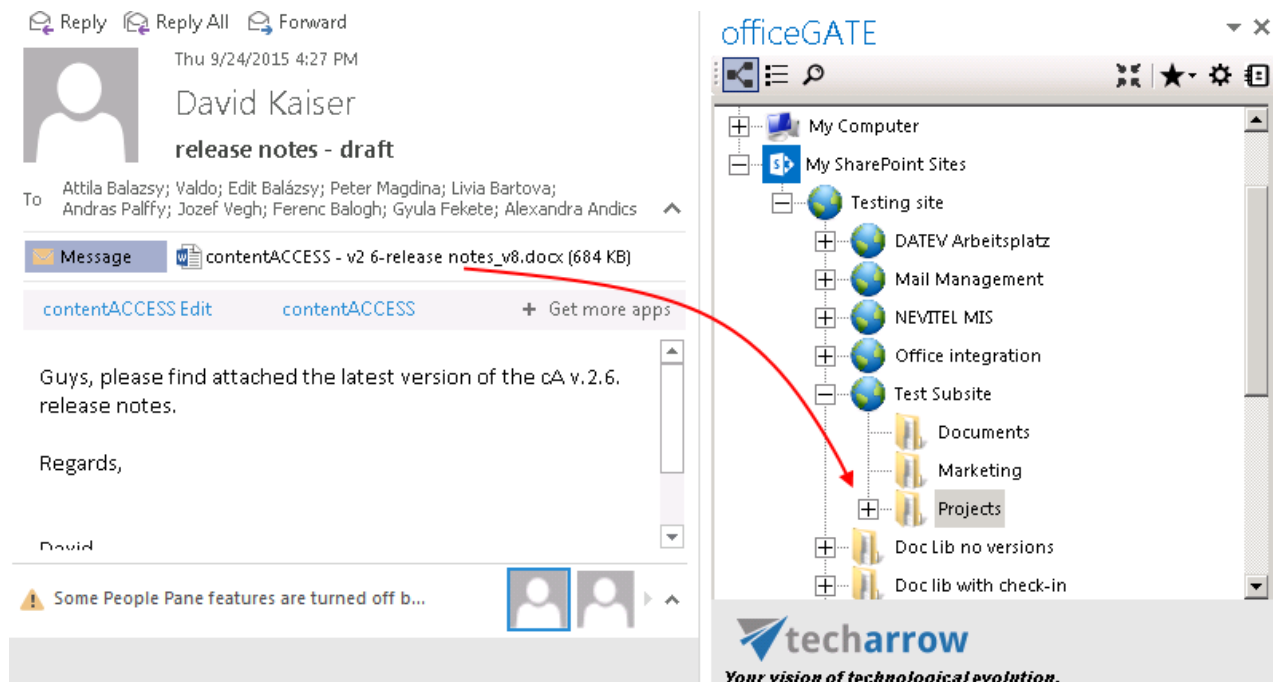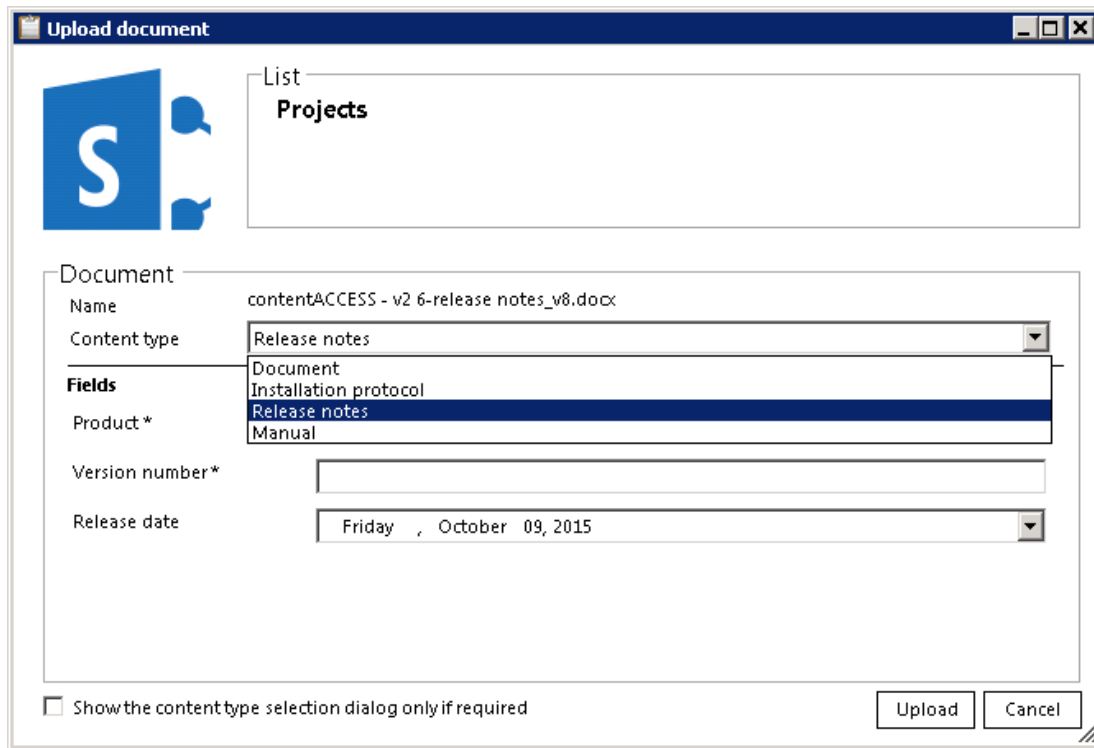
Check/uncheck the **Show the content type selection dialog only if required fields are present** checkbox depending on how you would like to use this feature. On the screenshot above we have configured, that we would like to specify these data only if there are required fields present.

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.

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

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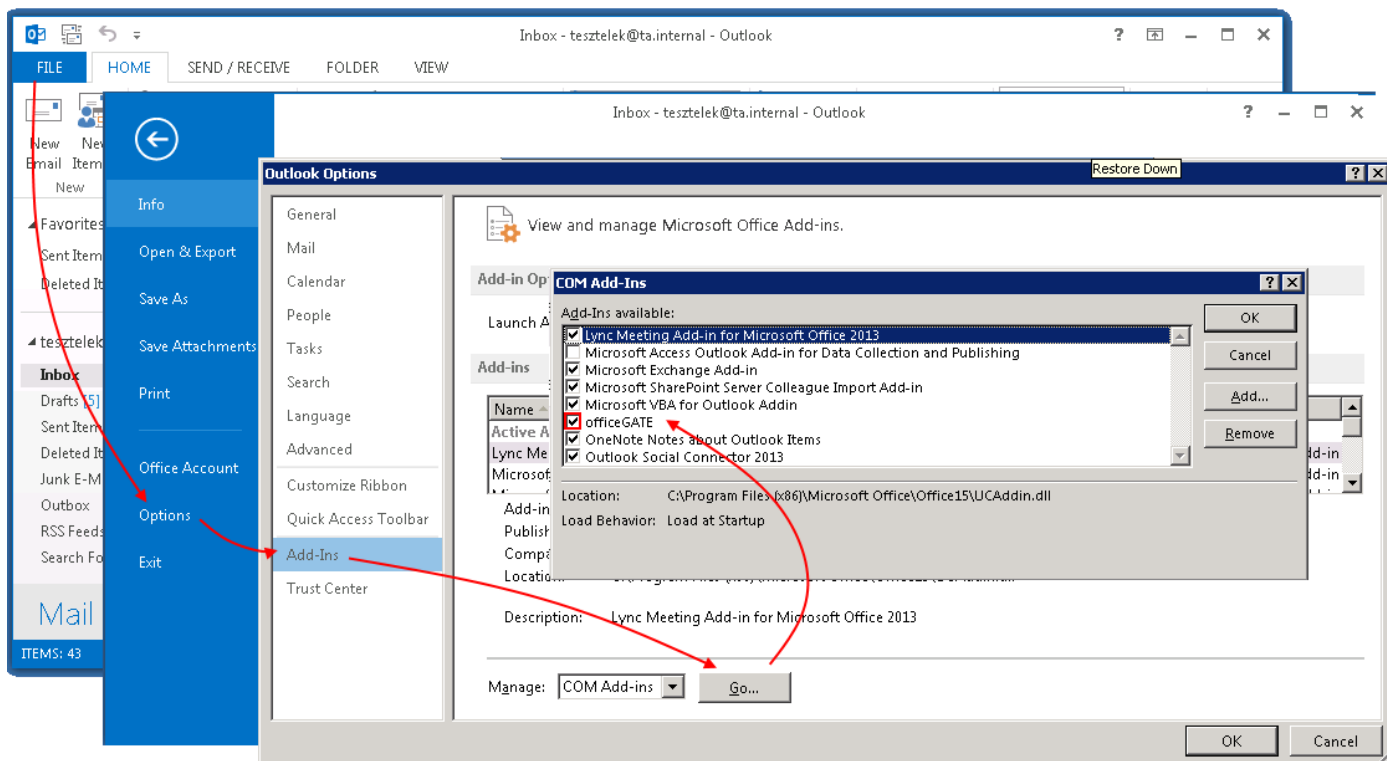
Troubleshooting

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.

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➢ **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.

➢ **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:
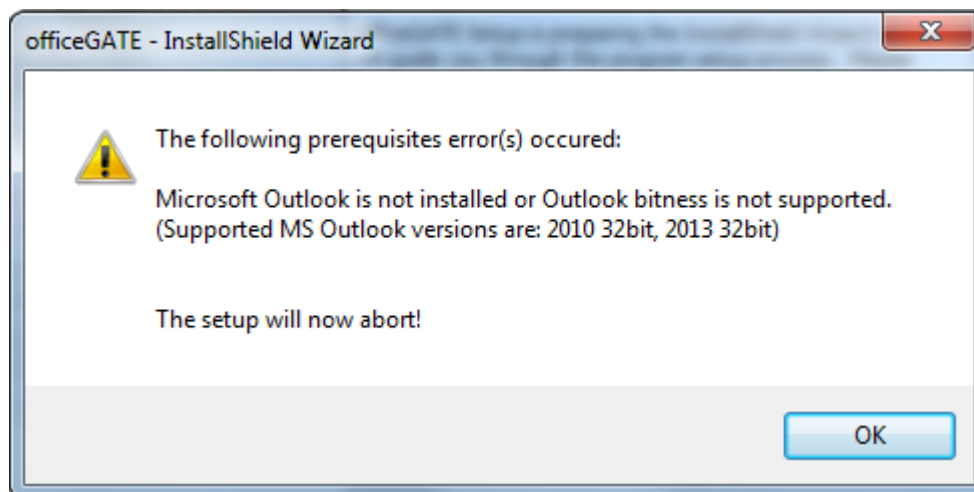

Please download the version of officeGATE which corresponds to the version of MS Outlook that you have installed on your PC.

➢ **What to do if the warning below appears in your MS Outlook?:**
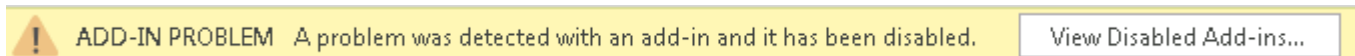
If you get the warning above and the officeGATE pane does not appear at the right side of your MS Outlook follow these steps:

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1) Click on the **View Disabled Add-ins**… button in the warning. **Disabled Add-ins** window will open as on the screenshot below:
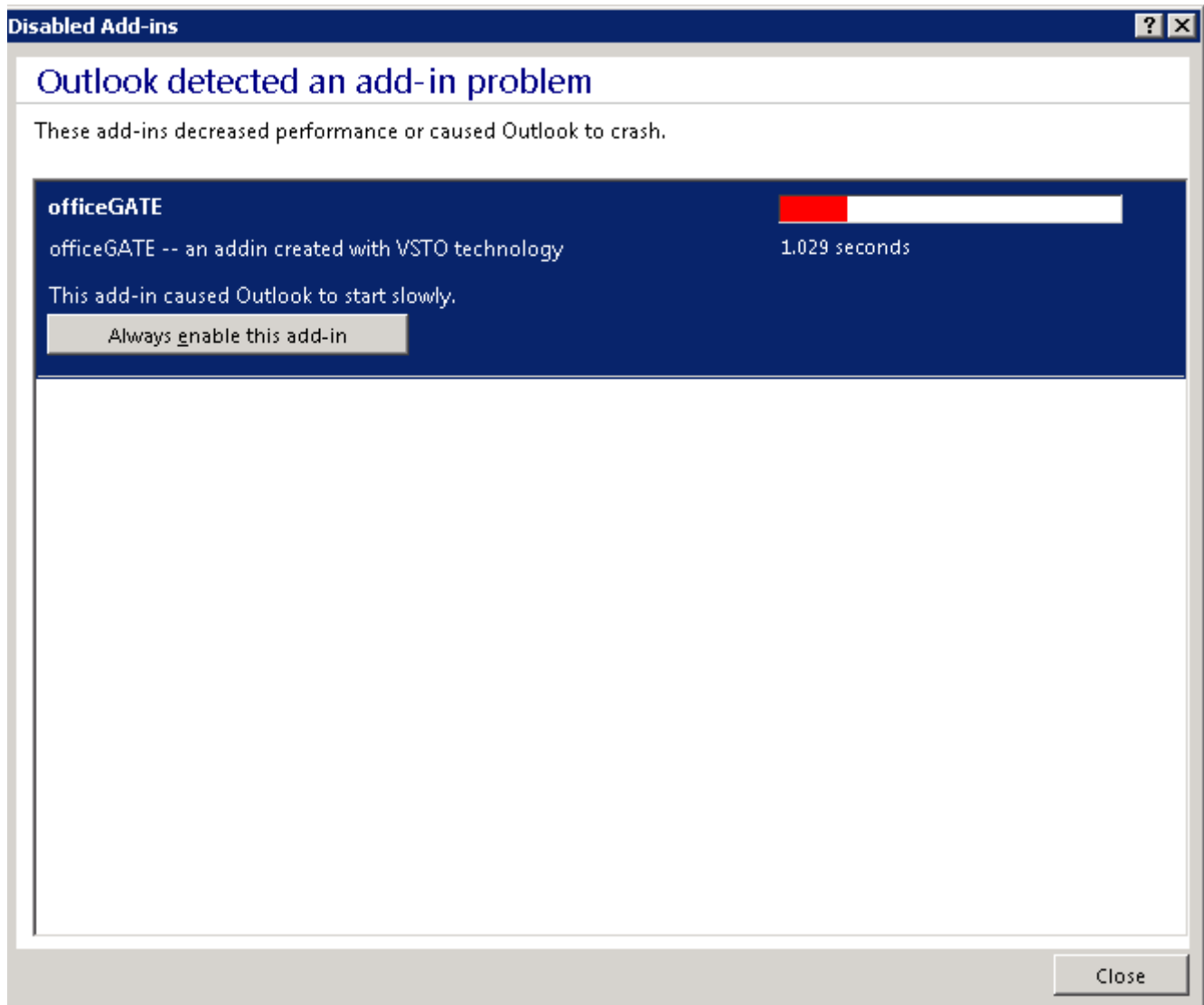
Click on **Always enable this add-in** and click **Close** to close the window. Run you Outlook again and the officeGATE panel will be visible now.

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